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ABSTRACT

The 20 articles in this issue of Illinois Libraries were written by practicing technical services librarians, library educators, and former librarians now involved in commercial enterprise. The articles are: (1) "The Development of Library Education in Illinois" (Anne V. J. Wendler); (2) "Financial Management in Acquisitions: Things They Never Told Me in Library School" (Donna M. Goehner); (3) "Every Day is an Education: Formal Continuing Education for Acquisitions" (Karen A. Schmidt); (4) "The Making of the Adaptable Cataloger" (Lois M. Pausch and Robert H. Burger); (5) "Education for Cataloging: An Open Entry" (Eloise M. Vondruska); (6) "Current Awareness for Catalogers: Sources for Informal Continuing Education" (James W. Williams); (7) "The Adequacy of Library School Education for Serials Librarianship: A Survey" (Diane Stine); (8) "Formal Continuing Education for Serials" (Elaine K. Rast); (9) "Informal Continuing Education for Serials: Keeping Up with the Journal Literature" (Susan Matson); (10) "Technical Services Education for School Media Specialists" (Blanche Woolls); (11) "Library/Media Specialist Education: Planning for 2000 and Beyond" (Gene Scholes); (12) "Computers and Libraries: The Response of Library Education" (F. W. Lancaster); (13) "Continuing Education for Automation Librarians: Current Issues and Practice" (Marie J. Gorecki); (14) "OCLC and the Continuing Education Program in Illinois" (Jean Wilkins); (15) "Implementation of the Innovacq Acquisition System" (Douglas A. DeLong); (16) "Staffing Technical Services: Expectations vs. Realities" (Brian Alley); (17) "Education for the Technical Services Manager" (Doris R. Brown); (18) "Educating the Librarian Manager" (Patricia F. Stenstrom); (19) "Educating a Publisher" (Patricia Glass Schuman); and (20) "Viewing the MLS from the Vendor's Perspective" (Rebecca T. Lenzini). Bibliographies are included. (THC)

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# *preface*

This is the fourth issue of *Illinois Libraries* to be sponsored by the Resources and Technical Services Section of the Illinois Library Association. For the subject of this issue, the editorial committee has chosen the topic of education for technical services. We believe that most of us involved in technical services, in looking back at what we did and did not learn in library school, have developed strong feelings about our formal education. By the same token, we have developed equally strong feelings about the direction which we want our continuing education (both formal and informal) to take, now and in the future. In light of this, the editorial committee asked a number of practicing technical services librarians, library educators, plus former librarians now involved in commercial enterprise to share their experience, knowledge, expertise, advice, and opinions on the subject with us and you.

As a result of the response to our request, we have been able to begin our issue with a history of library school education in the state of Illinois, and follow with articles dealing with aspects of education for technical services relating to acquisitions, cataloging, serials, media, automation, management, and employment outside the library. Bibliographies, which we hope that you will find useful, are included. Some articles are factual, some are opinion pieces. Perhaps, some will cause controversy. We hope that all will be of interest.

The editorial committee extends its heartfelt thanks to those who authored the articles appearing in this issue of *Illinois Libraries*. Their labors have made this issue possible, and it is by the effort which they put into their labors that we are provided stimuli.

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# the development of library education in illinois

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The development of library education in Illinois has a broad and diverse history. Four schools developed major library education programs; the University of Illinois at Urbana-Champaign, the University of Chicago, Rosary College, and Northern Illinois University. The programs at two of these schools, the University of Illinois at Urbana-Champaign and the University of Chicago, gained national prominence in the field of library education. Many other schools also have developed library education programs. Together they have shaped librarianship in Illinois.

In 1893 Katharine L. Sharp began a library school at the Armour Institute of Technology in Chicago. It was the first library school in the Midwest, and the fourth in the country. At the invitation of the University of Illinois it moved to Urbana in 1897. The move to the University of Illinois marked the first affiliation of a library school with an institution of higher education.[1] As a result of the move the school began offering a bachelor's degree, the first such degree in the field of librarianship.[2] In 1911 it became a graduate school when the school began to require a bachelor's degree for admission. The American Library Association accredited the school in 1926. In 1948 the school added a doctoral program and in 1964 a sixth-year specialist program.

Early in its history the school made attempts to reach students unable to attend the regular program during the academic year at Urbana. In 1911 it began offering summer classes. The program was designed so that a student could complete a degree program by attending four consecutive summers. In 1931 the school offered the first summer programs designed specifically for school librarians.

These early efforts expanded into extension offerings. In 1944 the first courses were offered at the Illinois State Library. In 1948 the first full-time extension instructor, Viola James, was appointed. She taught a sequence of three courses designed to meet state certification requirements for school librarians. Other faculty members taught extension courses in other subjects. The University of Illinois did not establish extension centers around the state, but offered courses where there was a demand for them. Although the University's Extension Division handled the details of setting up the classes, the library school retained full responsibility for the content of the courses. Course requirements were equivalent to those offered on campus. This permitted students to apply extension courses towards a degree if they desired to come to Urbana to complete a degree.

Alice Lohrer, a member of the faculty who taught extension courses during this period, summarizes the development of extension offerings in this manner. The 1940s showed the need for extension courses. It was during this period that high standards were set for course content and the basic extramural collections were developed to support the classes. The faculty members also offered consultant library service to school administrators in areas where the courses were taught. The 1950s saw an expansion of the curriculum at both the graduate and the undergraduate levels. During this period they began to offer special courses in medical librarianship in Chicago. The 1960s saw a further expansion of course offerings. It was during this period that a program of school library courses was cooperatively developed by the library school faculties of each of the state-supported teacher training colleges in Illinois. This uniform program of courses and course content was developed and recommendations for it were published for the guidance of teachers of school library courses. The library school faculties have continued to update this program.[3]

The University of Illinois incorporated audiovisual instruction into the curriculum in the summer of 1941. The faculty integrated it into the four general courses of the curriculum. This program served as a basis for a statewide program for training school librarians. The Illinois Library Association Subcommittee on Library Service to Schools prepared the program in 1943 and published it in 1946 under the title *Standards of Excel-*

*lence for Training Teacher Librarians in Illinois*. However, the faculty found that integrating audiovisual instruction into the general curriculum did not permit them to adequately cover the topic. Eventually they instituted a separate course covering audiovisual media.

In response to the Illinois State Library's need for research in the area of rural library development, the Library Research Center was established in 1961 at the University of Illinois Graduate School of Library Science by a grant from the Illinois State Library. Within a few years the program had expanded from research focusing on the development of public libraries to include diverse problems in all types of libraries. The base of support of the center also broadened to include individual research grants and direct support from the university.

One of the distinctive features of the school at the University of Illinois is its diverse publication program. *Illinois Contributions to Librarianship* first appeared in 1943. It was followed by *Occasional Papers* in 1949, the *Phineas L. Windsor Lectures in Librarianship* in 1949, and *Library Trends* in 1952. The school also publishes *Monographs*, a series of reprints and original works.

In addition the school sponsors an extensive program of conferences and publishes the proceedings from them. The Allerton Park Institutes, held annually in the fall, began in 1954. The annual spring Clinic on Library Applications of Data Processing began in 1963. Additional institutes and workshops are offered on special topics.

From its early years the University of Illinois Graduate School of Library and Information Science has played a leading role in the development of education for librarianship. Its early affiliation with a major land-grant university shaped its development of teaching, research, and public service. By 1897 the school rose to a prominent position, rivaling the New York State Library School founded by Dewey.[4] It played a leading role in the state in the development of education for school librarians and audiovisual instruction. The establishment of the Library Research Center in 1961 was a landmark in the development of research in the field of librarianship. The school played a leading role in developing extension classes. However, it was not the only library school in the state to have a significant effect on the development of library education. The Graduate Library School at the University of Chicago also played a leading role.

The establishment of the Graduate Library School at the University of Chicago was a major event in the professionalization of library education. In the early 1920s research had not developed in the library profession. Many librarians, realizing that excellent schools already existed for training librarians, desired a school devoted to research. As envisioned by the Chicago Library Club in a memorandum to the Carnegie Corporation on April 20, 1923, the school would provide "facilities for the development of the cultural, literary, bibliographical, and sociological aspects of librarianship as a learned profession built upon ideals and charged with responsibilities as definite and as vital in their implications as those of any other learned profession."[5] The Carnegie Corporation established the school in 1926 with a grant of $1 million. It formally opened for students in October 1928.

The Graduate Library School was the first library school devoted to scholarship, research, and publication. Until 1944 it offered only a doctoral program. Admission requirements at that time were graduation from an approved college, completion of an approved library school course, and at least one year of approved library experience. Once admitted, the focus of each student's program became his individual research project.

The American Library Association accredited the doctoral program of the Graduate Library School in 1934. In 1944 the school began to offer an undergraduate program. A new program began in 1948 that required a thesis. Upon completion the candidate received a master's degree. In 1969 the school began its sixth-year specialist program.

The Graduate Library School at the University of Chicago also supports an active publication program. It began publishing the *Library Quarterly* in 1931 and *The Bulletin of the Center for Children's Books* in 1947. It also publishes a monograph series, *The University of Chicago Studies in Library Science*.

The school sponsors many conferences and workshops. Its annual conference and its annual summer institute began in 1936. The school publishes the proceedings of these conferences and institutes. Other institutes and workshops are offered on special topics.

The Graduate Library School's focus on research was a major force shaping the development of librarianship. The point of view, mental ferment, and insistence on solid training that characterized the school from its beginning would transmit to other library schools as its graduates spread to teaching positions across the country, profoundly influencing teaching and research.[6] The establishment of the school was one of three events prior to 1940 that had a profound influence on professionalizing the education of librarians.[7]

In addition to the library education programs at the University of Illinois and the University of Chicago, major programs have also developed at Rosary College and Northern Illinois University. Although these programs did not have the same dynamic effect on the national development of library education, they have greatly influenced library education in Illinois.

The Library School at Rosary College opened its doors to students in 1930. It received its accreditation from the American Library Association in 1938. Its primary objective was to train librarians for Catholic institutions,[8] but it also strove to aid the Chicago metropolitan area in developing good libraries.

In the late 1960s and early 1970s Rosary expanded its curriculum. It developed a cooperative program with the Concordia College Graduate School of Education that permitted liberal arts graduates to earn a master's degree in library science and meet state certification requirements for teaching. Rosary also developed a program for media specialists as a part of its master's program. It developed a program in medical librarianship in cooperation with the Stritch Medical School of Loyola University and it developed a cooperative program with the McCormick Theological Seminary that permitted graduates to earn a master's degree in library science from Rosary and a Master of Divinity from McCormick.

In addition, Rosary has attempted to reach more students by offering evening courses for the benefit of students who work full-time. Course offerings are also structured so that a student may obtain a degree by attending consecutive summer sessions. This is particularly appealing to students in the school media program.

*The Catholic Booklist*, a publication designed to guide Catholic reading, was begun by Sister Luella Powers as a Rosary College publication in 1942. For many years it was edited by the library science faculty at Rosary College.

The first programs at Northern Illinois University were organized to train school librarians. In 1959 a separate Department of Library Science was formed. The department offered a minor in library science that was designed to prepare students for certification by the Illinois Board of Education as school librarians. With the approval of a Master of Arts program in 1963, the school expanded its efforts to training academic and public librarians. The master's degree program was accredited by the American Library Association in 1970. The school still concentrates on training school librarians. It offers an undergraduate program that allows teachers to be certified by the State Board of Education as school librarians and several graduate programs that prepare students for professional positions in learning centers.

In the mid-1970s the department turned its attention to developing extension and continuing education programs. It offered courses that lead to minimum certification as school librarians over a three-year sequence and basic courses that could be applied towards a degree at Northern. This permitted a student to obtain a degree at DeKalb with a minimum amount of residency.

Four major library education programs developed in Illinois. However, these programs were unable to fully meet the demands for librarians within the state. Many other library education programs have developed, ranging from programs at colleges and universities to programs at community colleges.[9] The focus of most of these programs today is to prepare students to meet the certification requirements to become school librarians and to train library workers.

Library education for school librarians has a more complex history than has been discussed here. Many programs have developed as a part of teacher education programs because of the certification requirements of the Illinois Board of Education. The first description of education programs for school librarians appears in the 1903 "Report of the Committee on Library Training." It describes programs designed to train teacher librarians at the University of Chicago, Illinois State University, and The Illinois State Normal Schools at Carbondale, DeKalb, Normal, and Quincy.[10] Although the comprehensiveness of this report is questionable, it shows that Illinois was a leader in offering training for school librarians.

From its early beginnings to the present day the development of library education programs in Illinois has had a dynamic and diverse history. The founding of the library school at the Armour Institute of Technology and the early programs for school librarians show the progressive outlook that has prevailed in the state from the very beginning of library education programs. The demand for a school devoted to research was met by opening the Graduate Library School at the University of Chicago.

The dynamics of the profession caused other changes to occur. In the 1940s the increasing demand for librarians instigated the development of extension courses at the University of Illinois. It was during this period that the University of Illinois inaugurated its doctoral program.

During the 1950s and 1960s many examples of expanding programs occured. Both Northern Illinois University and the University of Chicago began their master's programs. Rosary College expanded its pro-

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gram in school librarianship and developed its programs in medical and theological librarianship. The extension programs at the University of Illinois expanded to include a program in medical librarianship. It was also during this period that the University of Illinois and the University of Chicago began their sixth-year specialist programs.

Above all the history of library education in Illinois has been marked by continual growth. New schools were continually opening. New programs were developed. Constant efforts were made to reach an increasing number of students through evening classes and summer programs. This type of dynamic change will continue. Library education programs in Illinois can be expected to continue shaping the course of library education on both a national and a state level.

**Footnotes**

1. University of Illinois, State Library School, *Circular of Information, 1897-98* (n.p., [1897]), p. 3.
2. Laurel Grotzinger, "Katharine Sharp and the Armour Institute Library School," in *Reminiscences: Seventy-Five Years of a Library School*, ed. Barbara Olsen Slanker (Urbana: University of Illinois Graduate School of Library Science, 1969), p. 4.
3. Alice Lohrer, "A Quarter of a Century of Extension Teaching, 1944-1968," in *Reminiscences: Seventy-Five Years of a Library School*, ed. Barbara Olsen Slanker (Urbana: University of Illinois Graduate School of Library Science, 1969), pp. 99-100.
4. Gerald Bramley, *A History Of Library Education* (Hamden, CT: Archon Books, 1969), p. 81.
5. Robert M. Lester, "Greetings from the Carnegie Corporation of New York," in *New Frontiers in Librarianship: Proceedings of the Special Meeting of The Association of American Library Schools and The Board of Education for Librarianship of the American Library Association, in honor of the University of Chicago and the Graduate Library School, December 30, 1940* (Chicago: The Graduate Library School, The University of Chicago, 1941), p. 6.
6. Louis Round Wilson, *Education and Libraries: Selected Papers*, ed. Maurice F. Tauber and Jerrold Orne (n.p.: Shoe String Press, 1966), p. 275.
7. Carmal Edward Carroll, "The professionalization of education for librarianship, with special reference to the years 1940-1960" (Ph.D. diss., University of California, Berkeley, 1969), p. 38-39. For an opposing view see L[loyd] Houser and Alvin M. Schrader, *The Search for a Scientific Profession: Library Science Education in the U.S. and Canada* (Metuchen, NJ: Scarecrow Press, 1978).
8. Sister Mary Luella, "Department of Library Science, Rosary College," *Illinois Libraries* 40(1958):190.
9. For a complete listing of these programs see Travis E. Tyer, "Library Education Programs in Illinois," *Illinois Libraries* 62(1980):309-11.
10. Mary W. Plummer et al., "Report of the Committee on Library Training," in *Papers and Proceedings of the Twenty-Fifth General Meeting of the American Library Association held at Niagara Falls, N.Y., June 22-26, 1903* (n.p.: American Library Association, 1903), pp. 83-100.

# *financial management in acquisitions: things they never told me in library school*

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In the introduction to their book entitled *Acquisitions Management and Collection Development in Libraries*, Magrill and Hickey indicate that:

> Collection development and acquisitions, while not ordinarily perceived by the public as particularly demanding or exciting, contain elements that bring great personal satisfaction to those whose careers are spent in the library. . . . Little can excel the feeling that the librarian experiences when the material needed by a particular user can be placed immediately in his or her hand because that need was anticipated months earlier. Experienced staff in acquisitions units of large libraries often testify that they are called upon to use every bit of training and skill to interpret strange requests, correspond with remote dealers, and successfully handle complex and costly transactions to obtain material from all parts of the world.

I agree; and in the following pages I deal with my training for acquisitions work and particularly with the financial aspects involved in overseeing the acquisitions program in an academic institution. My perspective in this paper is strictly personal, and my observations will focus upon those areas of acquisitions work which I found to be inadequately covered in library school.

Aithough the preparation I received in library school for much of the work done by professional librarians was generally quite good, the coverage of fiscal practices in acquisitions was cursory, at best. It should be noted that I received my master's degree in Library Science in 1967 and my Certificate of Advanced Study in Library Science in 1974. At neither time were there courses devoted exclusively to acquisitions functions. Because I knew when I returned to the University of Illinois in 1974 to take post graduate courses that I needed a better understanding of this aspect of librari-

anship, I requested a practicum working under the Serials Acquisitions Librarian in the University Library. The request was approved, and I spent one semester performing a variety of tasks in that department. This experience was a great help to me when I returned to my position at Western Illinois University as Acquisitions/Serials Librarian in 1975. Had I not requested that practicum, I would have stepped into the job with very little practical knowledge of basic acquisitions routines. Even with the semester's experience in the Serials Acquisitions Department, there were many financial aspects of acquisitions' work I had to learn "on the job."

For example, my brief and limited experiences during the practicum had not included any work with publisher or vendor representatives. I knew very little about the efficiencies which can result from consolidating orders and placing them with a good vendor. I knew very little about the practices of specific publishers. And I was not certain when it was preferable to order directly from a publisher or to batch orders and place them with one vendor. I learned much of what I now know about this aspect of acquisitions work from firsthand experience, trial and error, discussions with other acquisitions librarians, and discussions with representatives for publishers and vendors. The support staff at Western was also aware of the strengths and weaknesses of many suppliers, and I was able to avoid what might have been blunders during my first year on the job by listening to their assessments of previous performance. Three of the staff members had worked in acquisitions for several years, and their combined experienced, coupled with the continuity they brought to the job, contributed considerably to the smooth operations of the acquisitions department. The fact that operations in the department ran efficiently, certainly, could not have been attributed to my efforts that year because I was learning as I went along. I had accepted the position as acquisitions librarian somewhat nonchalantly, but my state of composure was to change as I became more aware of my limitations.

Even though I had much to learn about vendors, publishers, and the book market in general, I had even more to discover about pricing and payments. Not only did publishers differ in their policies regarding ordering and fulfillment, but they also differed in their discount structures, their invoicing practices, their policies on returns, their handling of credits, and their willingness to work through vendors. At this point, I was concerned only with monographic publications. When I added to that the categories of standing orders and periodical subscriptions, the differences I had to be aware of became even more pronounced. The process of acquisitions was not, I discovered very quickly, just a matter of deciding what one wanted to purchase and determining its availability before the order was placed. There were also several other considerations which had to be addressed: Could we acquire the material less expensively by ordering direct, i.e., did the publisher offer a discount? Was the cost of handling hundreds of invoices from publishers for individual titles really less expensive, even with the discounts, than processing one large invoice from a vendor who would deal with the individual publishers? How much of a service charge was being added by vendors for handling special requests such as rush items? The preceding questions are presented only as illustrations. There were a variety of considerations which had to be weighed, depending on the type of material being acquired. For instance, I learned that approval plan procedures differed from firm order procedures as much as orders for periodical subscriptions differed from book orders. Again, few of these facets of the publishing world were covered in my library science course work, and I was grateful that I had not only a supportive and informed clerical staff but also colleagues in the library who were willing to spend time preparing me to handle these aspects of the job.

As if I had not sufficiently demonstrated my lack of knowledge in two basic areas of acquisitions, I was to add to that list my deficiencies in budgeting and accounting practices and procedures. Although I was aware of the fact that the materials being acquired had to be accounted for budgetarily, I did not realize the amount of detailed record keeping and the number of regulations with which one had to be familiar in order to administer an acquisitions budget of over half a million dollars. Fund accounts had to be set up and monitored for each of the thirty-five departments on campus; each of the internal library departments had its own fund account; subscriptions were paid from an entirely different university line item account than the books; and, to top it all off, there was a rather complicated formula which had to be applied for allocating money to the academic departments before orders could be placed against any funds. Additionally, I had to become familiar with not only institutional accounting policies and practices, but I also had to learn about the board of governors' regulations in order to conform to state regulations. I am mentioning these items not to elicit sympathy or to portray acquisitions work in a negative fasion. The point is that I believe I could have performed more effectively during my first few years in the position had the fiscal aspects of technical services been covered more thoroughly in my college courses.

There was considerable emphasis placed on cataloging and classification in my program, and there was attention directed toward bibliographical tools. However, there was virtually no coverage of the part of acquisitions work which caused me the most concern — financial management. During times when budget constraints are a fact of life in most academic libraries, it is necessary for librarians to make the best use of every dollar available for collection development. With that objective in mind, it is especially important that those responsible for acquiring materials know and implement the most effective strategies for stretching the book budget. Those librarians coming to the job with not only the bibliographical and evaluation skills required for collection development, but also with the technical knowledge of the financial realities, will be the ones in the best position to achieve that objective. At a time when accountability is a watchword, we have to be concerned with justifying the trust placed in our competencies. A knowledge of discount structures, service charges, prepayment arrangements, and other fiscal aspects of acquisitions, though mundane, is nevertheless precisely what is needed to earn that trust.

To individuals considering a career in acquisitions work a course or two in basic business operations should prove invaluable. There are advantages to having more than a nodding acquaintance with accounting principles, record keeping systems, and auditing practices to list only a few. It would also be beneficial to have opportunities to talk with representatives from companies which provide services to libraries. These people are often knowledgeable about what is happening in the publishing world because it is essential for their success that they be aware not only of their own products or services but also what their competitors are offering. Some sales representatives have also had previous experience as librarians, and these individuals are especially helpful because they can relate to the librarian's point of view. Their explanations and presentations are most likely to be ones that take into consideration the needs of the library in connection with the requirements of their companies. Furthermore, they frequently describe acquisitions procedures and practices they have encountered in visits to other libraries which might be applicable in one's own operation. Still, another valuable experience would be an opportunity to discuss how the budgetary practices in libraries are tied in with those of the central administration. Because purchasing agents, auditors, and budget directors deal with matters of fiscal policy on a full-time basis, their expertise can save many hours poring over manuals. Their explanations can also provide not only the "how" concerning financial practices but also often the "why."

For practicing librarians there are several avenues available for keeping up with current trends in acquisitions which range from presentations at local, state, and national conferences and workshops sponsored by professional organizations to in-service programs, articles appearing in the literature, and informal conversations with colleagues at other institutions. The scope of activities in acquisitions and collection development is broad and includes budgeting, allocations, statistics, vendor services, foreign purchases, cooperative acquisitions, out-of-print purchases, gifts and exchanges, approval plans, auditing, bidding procedures, file management, memberships, and standing orders to mention some of the more typical. Consequently, keeping abreast of issues, trends, and practices is a continuing endeavor. Therefore, even though formal education is important, there are so many components to this type of work that library school courses should be viewed primarily as a foundation upon which to build. Still, that base should be strong and provide the librarian entering the field with as much practical information as possible.

I have attempted to present what I consider to be some weaknesses in my preparation for acquisitions work as well as to point out what some might consider obvious requirements for effective performance, e.g., knowledge of basic accounting practices, familiarity with the vagaries of the publishing world, an understanding of budgetary processes, and an informed basis for critically evaluating the services of vendors. These are realities I have encountered on the job, and I trust that those individuals who are developing curriculums in library schools today are addressing these topics. If they are concerned about adequately educating acquisitions librarians, they will be working to identify the most appropriate methods for covering the financial aspects of acquisitions work.

## Footnotes

1. Rose Mary Magrill and Doralyn J. Hickey, *Acquisitions Management and Collection Development in Libraries* (Chicago: American Library Association, 1984), p. xi.

# every day is an education: formal continuing education for acquisitions

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"Continuing education" in acquisitions work can be considered either a deadly accurate phrase or an absolute misnomer. As almost any librarian working in the area of acquisitions will admit, library school training rarely equips the student and aspiring acquisitor to handle many of the most rudimentary problems and situations of acquisitions, or even to understand those processes fully at the most basic level. Hence, continuing education in acquisitions can be thought of as exactly that: from the first day in an acquisitions area, one must continuously educate oneself in the many and varied situations found in this type of work. Many of us discover early in our work that continuing education of ourselves as acquisitions librarians and, sometimes, of our colleagues, is one of the major keys to success. As the accurate descriptor, then, continuing education in acquisitions is — exactly — continuous and basic. As the misnomer — and the more correct perception — the phrase implies the continuation of some basic educational skills which, in fact, are rarely taught except through self-inducement.

Perhaps this is not so surprising. Acquisitions contains bibliographic work, certainly, but not in the more traditional sense. One does not describe or enumerate works, but takes fragmentary or complete bibliographic information and translates it to the business world of vendors and publishers. Acquisitions is not based on a body of theory, as is classification and cataloging; there are no prescribed courses for establishing vendor relations or setting up workable approval plans. A working acquaintance with reference tools is important, but the knowledge is put to a use different from that used with patron interactions. One learns in library schools how books are made, how binding is accomplished, and how to provide for appropriate preservation standards. Unfortunately, one learns how to acquire that published, bound, and ultimately preserved material mainly through osmosis, or some form of apprenticeship, or, failing that, by trial and error mixed with serendipity. Moreover, one is unlikely in library school to acquire a knowledge of the publishing business with which acquisitions must interact.

There are many areas of acquisitions in which one could be educated. The publishing industry, budgets and accounting, vendor relations, serial and monographic publications patterns, and personnel management all are important components. Built upon these components are the various functions of which acquisitions is comprised. The basic functions are ordering, claiming, and receipt of material; additionally, acquisitions librarians may be called upon to handle preorder bibliographic searching, precataloging searching, and various levels of collection development work, including selection, and the implementation of gathering plans. Recently, acquisitions librarians found it necessary to be versed in automation projects, to know the issues of on-line order placement, and electronic transmission of records, and to offer substantive recommendations on how to tag on to existing internal library record systems.

Ultimately, well-maintained and managed acquisitions work, which is a result of the understanding and implementation of all these above-named areas, has an effect upon collection development and maintenance efforts, and effective reference work, and naturally impinges upon the work flow of other technical services areas. In many ways, acquisitions work is a pivotal operation within any type or size of library; this area's successful interaction with the profit-making industries has a great deal of impact upon the ability of any library to meet its goals of providing both information and service. Current information and constant exchanges of ideas are of paramount importance in achieving the development of a successful acquisitions area.

Many of the avenues for both basic and continuing education in acquisitions are created through informal contacts. Personal networks continue to form one of the most useful ways in which librarians involved in acquisitions can learn new techniques, view various automated systems, and review a variety of work flows and organizational patterns. Additionally, many facets of any acquisitions area are internally prescribed: use

of forms, types of files, level of work handled, and sometimes, vendor affiliations, frequently are historically or legally prescribed. The latter situations make it especially difficult for formalized educational efforts, whether in library schools, libraries, or under the auspices of national organizations.

National organizational sponsorship of acquisitions institutes remains the best currently available way for obtaining and exchanging formal acquisitions information. The Resources and Technical Services Division Resources Section of the American Library Association sponsors workshops and preconference institutes throughout the country on a fairly frequent basis. In the near future, the newly-formed Acquisitions Committee of the RTSD Resources Section will be conducting acquisitions institutes in various locations in the United States. The Acquisitions Committee is charged with "providing a forum for programs and communications relating to library acquisitions," to consider acquisitions issues, and to collect and disseminate information about automated and manual acquisitions systems, as well as developing guidelines for evaluating these systems. The first of the workshops on acquisitions is being held as a preconference to the 1985 annual American Library Association Conference in Chicago, on July 4-5.[1]

The Library and Information Technology Association of the American Library Association also promotes continuing education opportunities, most recently in the areas of serials, and automation. The majority of the LITA discussion groups involve not only acquisitions, but also other library activities which may be changed or enhanced through automation. One in particular, the LITA/RTSD Application of Computers to Serials Control discussion group, is concerned with the acquisition and automated control of serials and is of interest to acquisitions librarians generally. Of equal interest are the publications resulting from these institutes, which make new concepts available to every library.[2]

Of a slightly less formal nature are the many national acquisitions discussion groups which meet at the ALA annual and midwinter meetings, offering programs on specific topics in acquisitions work, and providing a forum for the exchange of information, questions, and answers. These include the Bookdealer-Library Relations Committee, the Acquisition of Library Materials Discussion Group, and the Booksellers Discussion Group. The latter two groups also meet in tandem at all conferences, and the three groups (including the Bookdealer-Library Relations Committee) have met, traditionally, on Tuesday mornings from 8:00-12:30. These discussion groups and committee meetings are the single most important source of continuing education opportunities at the national conference. Typically, attendees will exchange specific information about acquisitions processes, and find that it is the appropriate forum for asking solutions to problems in individual situations. Of peripheral interest is the Collection Development Officers groups, formed around various sized libraries; while not discussing acquisitions directly, the groups do generate ideas concerning acquisitions procedures. Acquisitions also comes under review in discussion groups which include the other areas of technical service operations, including the Pre-Order and Pre-Catalogue Search Discussion Group, the Role of the Professional in Academic Research Technical Services Departments, and the Commercial Automation Discussion Groups.

Acquisitions librarians also should be aware of the Association of American Publishers-Resources and Technical Services Division Joint Committee, formed by the American Library Association and meeting on a regular basis at ALA annual and midwinter meetings. Other committees promoting similar offerings through ALA sponsorship include the Public Library Association Alternative Education Programs Section's Publishers' Liaison Committee, the Young Adult Services Division Publishers' Liaison Committee, and the RTSD Resources Section Booksellers-Library Relations Discussion Group. Library schools also offer some limited programs of continuing education in acquisitions work, although frequently within a larger topic. The Data Processing Clinics on Library Automation sponsored by the Graduate School of Library and Information Science of the University of Illinois-Urbana-Champaign offer an example of this type of program.[3]

Within Illinois, librarians may find that library systems, or loosely-defined library networks may form together to demonstrate new automated systems. The Illinois Association of College and Research Libraries of the Illinois Library Association recently approved the establishment of an acquisitions discussion group, which may offer programs at the annual conference, and will meet annually to discuss topics of mutual concerns.[4]

Formal continuing education efforts in acquisitions remain unexplored to a great extent. The national organizations promote the greatest number of sessions in this area, although state and local organizations offer some opportunities. Possibilities for loosely-formed groups based on locality, type, or size of library should be explored more fully. Requests to library schools for summer institutes, and requests to vendors for local programs and demonstrations are possible avenues to explore.

## Footnotes

1. "Acquisitions Committee." *ALA Handbook of Organization*. (Chicago: American Library Association, 1984): 142. For information concerning the acquisitions workshops, write to Resources and Technical Services Division, ALA, 50 East Huron Street, Chicago, Illinois 60611.
2. See, for example, William Gray Potter and Arlene Farber Sirkin. *Serials automation for acquisition and inventory control, papers from the Institute, Milwaukee, September 4-5, 1980, Library and Information Technology Association*. Chicago: American Library Association, 1981.
3. See, for example, Clinic on Library Applications of Data Processing (19th: 1982: University of Illinois Urbana-Champaign). *Library automation as a source of management information*. Ed. by F. Wilfrid Lancaster. Urbana: University of Illinois Graduate School of Library and Information Science, 1983.
4. For more information about this group, write the author, at University of Illinois-Urbana-Champaign Library, 246D Library, 1408 West Gregory Drive, Urbana, Illinois 61801.

# *the making of the adaptable cataloger*

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The conflict between education for librarianship and training for specific tasks performed in the library has been debated since 1900 with E. C. Richardson and William Poole and recently in articles written by Herbert S. White of the Indiana University School of Library and Information Science and those who chose to rebut and discuss his views.[1-4] Preparation for librarianship is a subject which excites much discussion. This has been especially true in the last couple of years with relation to the Federal Office of Personnel Management's efforts to redefine basic competencies for federal librarians.

The teaching of cataloging as part of this preparation can also be viewed as either education or training. Education, on the one hand, produces prospective librarians who have learned a surfeit of cataloging theory but who have little or no practical experience in the "real" world of cataloging. The results are neophytes unable to perform actual cataloging tasks satisfactorily once on the job. Training, on the other hand, results in recently graduated librarians who have mastered the fundamental practical aspects of cataloging but who do not have the philosophical and conceptual foundation that allows for mature reasoned responses to changing library and cataloging situations. Are these two views of the process of teaching cataloging reconcilable?

Unfortunately, published materials on the teaching of cataloging deal with little more than descriptions of a given curriculum and/or ways of approaching teaching that will produce the best and most enthusiastic catalogers.[5] This paper proposes one pedagogical approach that bridges the gap between education and praxis and that leads to a professional who may rightfully be called an adaptable cataloger. Adaptability was, thirty years ago, identified as a goal by Lester Asheim, who stated "that adequate training in the library schools would let the student know that there are several ways of accomplishing the same ends, that methods taught in the schools may need modification in individual cases, and that it is not necessary to have a complete revolution in the library in order to introduce certain useful changes. In other words, the key was identified as *Adaptability* — what the field wants of its new employees is awareness of techniques combined with flexibility; discipline combined with imagination; and a willingness to accept the professional librarians' obligation to perform, teach, or supervise many tasks which may not be completely professional in nature. . . . The adaptable librarian is one who knows the basic principles, who is open to new ideas, and who is not either too enamoured of traditional methods or indiscriminately critical of them . . . the educational program prepares the student to *become* a librarian; it does not turn out a completely expert librarian upon graduation."[6] The model described here is based on the recognition that the cataloger is an intelligent, reflective interpreter who serves not only as an intermediary between the material to be cataloged and the cataloging rules and their interpretations but also as the mediator between the contingencies of local practice and the user. The cataloger must also keep in mind the increasing need for cooperation in cataloging engendered by the rise of bibliographic utilities. This multifaceted role requires that the cataloger develop the ability to comprehend and assimilate the complexities of all these components. At the same time the interpretative approach suggested here aims at producing catalogers who

can fulfill the three objectives or principles of cataloging espoused by Sanford Berman: intelligibility of the record, findability of materials, and fairness to the materials and the topics covered.[7]

This interpretative approach recognizes that the material to be cataloged often possesses ambiguities that cannot be abolished by decree or by browbeating the perceiver into believing that no ambiguity exists. This possibility crops up most often in choice and form of entry decisions but also exists in bibliographic description as well. The rules and other published materials designed to aid the cataloger in cataloging are only guidelines; they are not pronouncements that require adherence in lieu of penalty. The cataloger must often wade through several layers of guidelines, some of which contradict each other. This is all played against the background of the local context and the knowledge that a cataloger has about the patrons. In this manner, interpretation, and by extension, cataloging itself, becomes a political act in the analogous sense that agencies of the government interpret, ignore, or follow to the letter, the legislation passed by an often less-than-omniscient legislature. The choices open to the cataloger are not always dictated, but certain choices have certain consequences. A reflective cataloger will be as acutely aware of those consequences as he/she is of the rules, the rule interpretations, the local context, and the lack of clarity that the material has or does not have, and will make appropriate decisions based on experience and knowledge of expected results. But it is one thing to talk about such matters theoretically. It is quite another to convey such concepts and intuitive responses to students. The practicing cataloger, as a teacher of cataloging, can bring valuable experience into the classroom that can help to communicate the value of the interpretative approach. We suggest that it be done in two stages: (1) a brief introduction to the organization and theory of cataloging and (2) a focus on the practice of cataloging itself.

Cataloging is part of the library school curriculum because it has long been recognized that any librarian needs to have an understanding of the theory and philosophy of this subject. It is still clear that anyone who works in a library should at least know something about the fundamentals of the production of the library's major retrieval tool.

In the first stage, the practitioner/instructor faces the necessity of understanding the whole thrust of the instructional program in the library school and then molding his/her experience to the material to be taught. By examining the early history of catalogs and the reasons for the need to impose order, a foundation can be laid for student comprehension of current catalogs, both in form and in function. Discussion of the historical evolution of the catalog's purpose provides the groundwork for the need for cataloging rules and for new editions of those rules in response to changing technologies. This in turn can stimulate students to look to the future, to try to imagine the forms the catalog might take and even to question the need for catalogs and cataloging as we now know them.

With the background of the catalog firmly in hand, the practitioner/instructor then can turn to the analysis of cataloging rules, not in the context of how to catalog, but in the ways the rules have reflected the approach of librarianship to the organization of library materials. Tracing the line from Panizzi and Cutter through the various editions of the ALA rules to Lubetzky and the Paris Principles and finally to AACR 2 provides the student with the theoretical basis for understanding why library patrons often find catalogs baffling and why other librarians view catalogers as contributing to confusion and chaos. Without actually demanding that the student catalog any materials in this stage, the instructor can demonstrate how a catalog record produced under one set of rules is often difficult to recognize when produced under another. For the practitioner/instructor who has had experience with one or more sets of rules, it is reasonably easy to illustrate through examples how changes can occur in the working lifetime of the cataloger and how this affects the cataloger, the patron, other librarians, and, most of all, the catalog. When the instructor has served as a practitioner and especially has had the additional advantage of interacting with patrons, the recognition of the patron as end user becomes an important part of the pedagogical process. This can be expressly brought out in discussion of rules and rule changes so that students who may never catalog can become cognizant of the way the catalog appears to those who use it and to those who create it.

Throughout this first stage current rules and other cataloging tools are introduced, as applicable, at that part of the course where a discussion of them is appropriate. An understanding of the use and limitation of AACR 2, classification schedules, and subject heading thesauri including the LC subject headings can serve to increase catalog literacy for future catalogers and for those students who will never catalog.

In the second stage of this approach, the practitioner/instructor faces the daunting task of deciding whether or not students should learn the details of the rules, the interpretations of those rules promulgated by the Library of Congress in their Rule Interpretations, the structure and peculiarities of machine-readable formats for these materials, the fundamentals of authority work, and the assignment of subject head-

ings and classification. It hardly seems possible, or desirable to teach all this in a one semester course; it would certainly not be wise to try.

How then does the educator meet or satisfy all these demands and yet not give in to the temptation to dwell too much on details at the expense of a basic understanding? In short, what should be taught in the cataloging practice stage that is supposed to deal with the cataloging process itself and not with bibliographic organization or the purpose of the catalog or other necessary areas mentioned earlier? This paper answers this question only with regard to descriptive cataloging and will ignore the pedagogical problems associated with classification and subject thesauri.

What comes first in this stage is a generalized description of the process of cataloging in a typical cataloging department. Second is a more detailed discussion of the structure and attributes of the tools that a cataloger uses: the rules, the rule interpretations, local policy, etc. Third is actual experience in the application of rules and rule interpretations to books, serials, and other materials. The process is broken down into small steps so that each element makes sense and its relationship to other elements and the overall process is demonstrated.

For example, we initially deal with bibliographic description. At first, a title page of a book is presented with an accompanying bibliographic description. Along with this is a sheet that breaks down the bibliographic description into the eight primary areas of description.[8] Under each area, several rule citations and citations to rule interpretations are given that prescribe the bibliographic description given from the title page presented. The students read the rules, see the title page and bibliographic description and with the help of the instructor, the three are conceptually related. The students then engage in this process themselves, i.e., they are given a title page and produce a bibliographic description and citations to rules and rule interpretations. The challenge for students is to express their understanding of the process by which the description is produced and in their interpretation of published guidelines and bibliographic details that results in a bibliographic surrogate. These exercises are then reviewed, ambiguities discussed, and possible alternatives displayed from which students learn that there is no one right way and that the rules are truly guidelines and not laws.

In a similar way, choice and form of entry and making of references and construction of authority records are also covered. The practitioner/instructor provides examples, from experience, of records that embody the principles studied and that exemplify how the process is employed in real-life cataloging situations. Admittedly, the students are exposed to only a couple of dozen books or examples in this way, but the one thing they have been taught, and which they hopefully will find hard to forget, is a *process* and *way of thinking*. They begin to realize that they are interpreters of several different forms of human communication: the published material itself, the cataloging rules, and the rule interpretations that correspond, and the environment in which they might be working. The result is beneficial for any future librarian. Future reference librarians learn about how catalogs are made thereby teaching these students to be competent interpreters of catalogs. Future catalogers have been taught a method of thinking that can be carried on to any job. Experience with thousands of titles is all that is lacking. Above all, however, an excitement, an enthusiasm, a notion of intellectual integrity, are given to the student that are difficult to erase, even with the passage of time.

We have found by experience that such a pedagogical approach does, to paraphrase Asheim, teach a person to become an adaptive librarian. Could library education for cataloging ask for more?

## Footnotes

1. Herbert S. White, "Defining Basic Competencies," *American Libraries* 14:519-525 (September 1983).
2. Mark Plaiss, "New Librarians Need Skills, Not Philosophy," *American Libraries* 14:618 (October 1983).
3. Letters to the editor of *American Libraries* by Philip R. Thompson and Margaret Edwards. *American Libraries* 14:704 (December 1983).
4. Herbert S. White, "Subverted by Pragmatism," *Library Journal* 109:861-862 (May 1, 1984).
5. For an example of the latter see John J. Boll, "Teaching 'Efficient and Economical' Cataloging," *Journal of Education for Librarianship* 2, no. 3:154-157 (Winter 1962).
6. *The Core of Education for Librarianship*, ed. by Lester Asheim. (Chicago: ALA, 1954), pp. 42-43, 44.
7. Sanford Berman, *The Joy of Cataloging: Essays, Letters, Reviews, and Other Explosions* (Phoenix: The Oryx Press, 1981), pp. xi-xii.
8. The authors owe the following pedagogical method to Arnold Wajenberg, principal cataloger, University of Illinois at Urbana-Champaign.

# education for cataloging: an open entry

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To some catalogers, the prospect of continuing education is about as exciting as attending a birthday party for Melvil Dewey. However, we all need to remind ourselves, or be reminded occasionally, that education is a lifelong process. Education cannot, and should not, be thought of as being finished upon the bestowal of a degree. And as cataloging is at the center of library and information science services, it is a critical part of our profession. Cataloging is a dynamic activity that requires its practitioners to be current with today's standards, constantly building on the foundation established in graduate library school.

I have worked in an educational institution as a technical services professional, and as a volunteer in the continuing education programs of the state library association and its sections. More recently, I have been working in a public library. The common thread in all these activities is the heart of library and information science: the dissemination of information. In our rapidly evolving society, I find it somewhat contradictory to think that a professional information disseminator would not be involved in the receiving end of the process, i.e., be participating in formal continuing education activities. And what kind of continuing education activities am I referring to? Workshops, conferences, seminars, mini-courses, traditional courses, etc., are the obvious sources of continuing education. An organized plan of study by an individual can also provide continuing education, as can temporary or short-term jobs in an area of the profession that might be unfamiliar to you.

The obvious topic of continuing education programs for catalogers is the rules of cataloging. But other concerns of catalogers include the understanding and application of subject heading systems, descriptive cataloging requirements for new formats, the use of authority files, to name just a few. Education for cataloging in the graduate school cannot possibly provide an individual with all the facts for all the problems and jobs that occur in all library settings. Therefore, there are times when an individual needs to be reeducated to deal with new options and processes; with different cataloging schemes; with new bibliographic utilities, etc. Such advanced learning must be built upon the foundation of principles learned in the graduate library school.

An example I can draw on from personal experience emphasizes the fact that we each need to be responsive to continuing education programs that might not be obviously and immediately useful, but which can help develop us as knowledgeable professionals. I worked with the Library of Congress classification for ten years. I (more or less) ignored programs that were offered on the Dewey Decimal Classification, at least as being of any relevance to me. But now, having just completed a year as a serials cataloger in a large public library that uses edition 19 of Dewey, I would welcome the opportunity to attend a DDC 19 workshop. (But I am also remembering my LC!)

The point I am trying to underscore is that cataloging is not a static activity. To be fair to yourself you need to attend continuing education programs throughout your career. Where can you expect to find continuing education programs? Start in your hometown and system area, and move on to statewide conferences and meetings, and then on to national and international meetings. You will find pertinent programs at all these levels. I believe there is merit in attending continuing education events at all these levels, at different times in your career, because these various levels of meetings serve different purposes. Many professionals will readily attend a meeting in their local or state area, basically because of the affordability of these kinds of meetings. However, many professionals are reluctant to attend a national or international meeting. The obvious reason is the economics of attending this kind of meeting. They do not see a return on their investment from attending national or international meetings.

I believe that national and international meetings offer a great deal to the individual cataloger, and would encourage you to attend at least one such meeting to see for yourself. At national and international meetings you are more likely to connect with the "movers and shakers" of the profession, who write and revise the standards and rules with which you find

yourself working everyday. And as you occasionally struggle with the application of a rule or practice in your local setting, attendance at a national or international meeting gives the perspective to understand why the rule was written as it is. It is enlightening to meet the individuals who create the subject headings and develop the MARC formats, because you learn that there really are people doing these jobs. And they base much of their decision-making on the input of many professionals. LC has even been known to change a name authority heading based on one librarian's documentation that the name as they established it was incorrect. Library and information science is an international profession, and it helps to get through the seemingly arbitrary rules if you can meet others in a national or international setting, and be reminded that you are a part of that international group.

Read the library literature, your system newsletters, the calendars provided by various agencies and professional organizations, and you can see the wealth of continuing education programs available. Some of these programs are bound to be of current interest to you. But do not be reticent to attend a meeting that is of seemingly peripheral interest, for at such a meeting you can pick up valuable pieces of information, or discover a new area in the profession that you might want to pursue. As you see lists of meetings, think of how a meeting might be useful to you right now, but also of how it might help you next year or two years from now. Keep building your knowledge base. If you find that the topics you would like to be explored are not being offered, then by all means, speak up. Let your professional organizations and associations know the topics you want discussed. Or better yet, volunteer to be involved in the planning for continuing education programs for cataloging, for then you can really help shape the content of the programs.

If financial limitations are keeping you from attending continuing education events, plan a long-range timetable and budget in an occasional continuing education event. Think of it not as an expense, but as an investment. By investing in yourself, you know there will be a return to you. Remember, if there is an AACR 2, can AACR 3 be far off? Will you be ready for it?

# *current awareness for catalogers: sources for informal continuing education*

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Informal continuing education for catalogers consists largely of the perusal of selected library science journals. As professions do, in general, librarianship depends on journals to transmit information quickly and to provide a continuing forum for the discussion of topics pertaining to the discipline. Catalogers should concern themselves particularly with the material being generated on cataloging and classification, while bearing in mind that effective cataloging cannot be done in isolation. A general knowledge of other technical services operations and, equally important, of public services needs and functions is required to create and maintain a library catalog of maximum usefulness.

Professional memberships are crucial to current awareness. Catalogers should belong to the American Library Association (ALA) and within ALA to the Resources and Technical Services Division (RTSD) where a myriad of sections and committees exist to address cataloging concerns and problems. Basic ALA membership dues include a subscription to *American Libraries*, the association's official journal, and division dues in RTSD include subscriptions to *Library Resources & Technical Services* and the *RTSD Newsletter*. It is important to know that the articles appearing in these journals are not written by ALA staff and do not necessarily express association thought (that purpose is served by editorials). Authors are usually librarians with expertise in the area on which they have chosen to write, and manuscripts undergo a referee process before being accepted for publication.

*American Libraries* (monthly, except combined July/August issue) carries assocation news, library news of national and international interest, reports on the summer and midwinter ALA conferences, and articles on a wide array of professional subjects and concerns, including cataloging. A continuing education course feature was initiated in 1984 to assist ALA members in keeping abreast of new and complex developments. The first such course was cataloging related, being "Modern Subject Access in the Online Age," which appeared in five parts from February through June under the general editorship of Pauline A. Cochrane. Another 1984 introduction was "Software Showcase," a service designed to alert readers to microcomputer programs of interest to libraries. Among the several regular columns is "The Source," which occasionally reports on technical service studies in progress, or concluded, and recent and future publications.

*Library Resources & Technical Services* (quarterly) is comprehensive in all aspects of library technical services. More than fifty articles appeared in the seven issues published from January/March 1983 through July/September 1984. The entire focus of the January/March 1983 issue was on cataloging. Four papers from the 1982 Philadelphia preconference "Prospects for the On-line Catalog," and three from the conference program entitled "Subject Analysis in the Online Environment," were featured while a final article discussed subject access to juvenile material. The six subsequent numbers included three articles on AACR 2 and three more reporting on user studies of on-line catalogs, while single articles discussed considerations for on-line holdings structures, a cost model for retrospective conversion, an Association of Research Libraries (ARL), members use of the Washington Library Network's authority system, cataloging of machine readable materials, treatment of IEEE publications as serials, and the problems posed by duplicate records in on-line bibliographic utilities. Prior to 1984, one issue each year was comprised of article reviews of the previous year's work and publishing, with descriptive and subject cataloging treated in separate articles. In 1984, as an experiment, a single article reviewed 1983s technical services activities. Yearly features include the annual reports of RTSD sections, the annual report of the Decimal Classification Editorial Policy Committee, a call for nominations for RTSD awards, and an announcement of the award presentations.

The *RTSD Newsletter* (8 nos. per year) instituted new columns on preservation, standards, and technical services management in 1984. Other columns report on RTSD work and activity, technical services research, and on-line catalogs, while "Library Exchange" provides a forum for describing in-house activity and "The Marketplace" carries news releases from vendors and suppliers. Selected RTSD programs from the summer and midwinter conferences are summarized. Abstracts of ERIC documents, a listing of recent publications, and short book reviews are featured. Beginning librarians who want to become involved in the work of RTSD should note the volunteer form that is included in one issue per year.

To create and maintain bibliographic records and a catalog that provide for the fullest possible access to the collection, catalogers must know the service aims of their library and the catalog related needs of colleagues in public service units and the institution's primary clientele. While a certain amount of such knowledge is only acquired on the job, catalogers in most settings will find the learning process facilitated by membership in the appropriate type-of-library division in ALA (academic/research, school, public). The Medical Library Association, the Music Library Association, and several regional law library associations exist as possible options for catalogers in those disciplines. Other catalogers, responsible for specialized material and/or a select clientele, should investigate the Special Libraries Association to determine whether their field is represented among SLAs twenty-eight divisions.

Most librarians in the contemporary environment will find benefit in regularly reviewing at least one of the several journals being published on information systems and technology. The first choice for catalogers should be *Information Technology and Libraries* (quarterly), the journal of the Library and Information Technology Association (LITA) of ALA. A subscription is included in LITA division dues. The journal provides an excellent overview of trends in library automation and many articles are directly targeted to cataloging. Cataloging topics explored in issues from March 1983 through June 1984 included the concept of the MARC (Machine Readable Cataloging) format, MARC coding of the Dewey Decimal Classification (DDC) for subject retrieval, retrospective conversion with an Apple, determining the number of terminals needed for on-line catalogs, searching in on-line catalogs, and a comparative evaluation of two on-line catalog systems. News, announcements, book reviews, and an extensive listing of recent publications are featured. Membership in LITA also includes *LITA Newsletter* (3 nos. per year) which, in addition to reporting on LITA activities and programs, has such columns as "News from the Field" and "Online Catalogs."

Professional memberships in state and/or regional associations are necessary for local current aware-

ness. Beginning librarians, who seek active involvement in their professional associations, may also find that committee appointments come more quickly in such smaller organizations. Membership dues in the Illinois Library Association (ILA) includes subscriptions to *The ILA Reporter* and *Illinois Libraries*, and division dues in the Resources and Technical Services Section (RTSS) include a subscription to *Tracings*. *The ILA Reporter* (bimonthly) is given to news of ILAs several sections. *Illinois Libraries* (monthly, except no issue July-August) is published by the Illinois State Library. News items are excluded, with issues constituted entirely by articles focused on libraries and librarianship in the state. Issues are often thematic, and numbers on technical services in Illinois appear from time-to-time.

*Tracings* (quarterly) reports the work and activity of RTSS and its members. Announcements of ILA conferences and workshops and non-ILA conferences and workshops held in Illinois are included, as are state and national news items of library interest. A magazine format was adopted in 1984 and the July issue printed a three page article on the cataloging of microcomputer software. Selected programs from ALA conferences are reported on. A regular column is the one to two page "Elsie! Elsie! LC Elsie!" wherein cataloging and classification questions and problems are discussed. A volunteer form for RTSS committee assignments appears in one issue per year.

Selectivity must be exercised for reasons of time and cost when journals, other than those received as a benefit of professional membership, are given consideration. Use of the resources in library science collections is encouraged for those fortunate enough to be in areas hosting a library school. Where staff size is sufficient and administrators are sympathetic, institutional subscriptions are recommended. Group subscriptions or joint subscriptions are also good approaches to expanding access to professional literature while keeping expenditures tolerable. Whatever the circumstances, the aficionado of cataloging will want to be without neither *International Cataloguing* nor *Cataloging & Classification Quarterly*.

Issued by the International Federation of Library Associations and Institutions (IFLA), International Office for Universal Bibliographic Control, *International Cataloguing* (quarterly) carries information about cataloging activity throughout the world and, perhaps more importantly, alerts the reader to trends and developments toward international cataloging and cataloging related standards, an area receiving unprecedented attention as automation continues to advance standardization nationally. IFLA projects and publications are reported and selected papers from the annual IFLA conferences are summarized. Topics of articles appearing in the 1984 issues included cataloging of machine readable data files, PRECIS, International Standard ISO 7154 Documentation (bibliographic filing principles), and International Standard ISO/TR 8393 Documentation (bibliographic filing rules), while articles in 1983 included ones dealing with IFLA and multinational cataloging rules, the use of ISBNs, a report on the study of the International Standard Bibliographic Description (Serials)/International Serials Data System compatibility, and cataloging and bibliographic control in the Federal Republic of Germany.

*Cataloging & Classification Quarterly* (Haworth Press) was begun in 1980 for the expressed purpose of providing an international forum for information on bibliographic control, particularly in the areas of cataloging and classification. To date, thematic issues on the Library of Congress subject headings, the future of union catalogs, and serials cataloging with *AACR 2* have been published. In other numbers, nine articles have explored on-line catalogs and nine more areas or concepts of *AACR 2*, while the cataloging of machine readable data files was discussed at length in a three part article. LC, DDC, and specialized classification schemes, MARC cataloging-in-publication/MARC LC discrepancies, the ARL Microform Project, cataloging job possibilities, and filing rules have been among the subjects of other articles. Occasional features are "Communications," a forum wherein librarians may describe in-house cataloging practices and procedures, and "Subject Analysis Systems," a column which selectively reports on newly developed subject lists, classification schemes, and thesauri for specialized collections. Book reviews and an extensive listing of recent publications are often included.

*International Classification* (3 nos. per year, INDEXES Verlag, Frankfurt) exists as a forum for the discussion of classification theory and processes and the new *Technical Services Quarterly* (Haworth Press) holds promise for joining *Library Resources & Technical Services* as a second good comprehensive technical services journal. The first issue of *Technical Services Quarterly* was thematic, with the future of technical services speculated upon in thirty some articles. A second thematic issue on subject cataloging has been announced. Issues of *International Classification* generally include three or four articles, news, announcements, and book reviews. Two extremely valuable features are a continuing bibliography of classification literature and reports of research projects in classification and indexing. While the journal provides unique material, its esoteric nature and strong German bias do not recommend it highly for individual subscribers.

Serial catalogers will find *The Serials Librarian* (quarterly, Haworth Press) and *Serials Review* (quarterly, Pierian Press) of interest, and catalogers dealing primarily with microforms should look into *Microform Review* (quarterly, Meckler Publishing). *Microform Review* is concerned with all aspects of the microformat field and features articles occasionally on bibliographic control. Readers of either serial journal are exposed to a wealth of material on the diverse aspects of serials librarianship from management to claim and check-in, as well as to news and articles about serials cataloging. The discussions of RTSD Serials Section Committee to Study Serials Cataloging at ALA conferences are reported in detail in *Serials Review*. Another feature is an annual review of monographs and journal articles pertaining to serials published during the previous year. Both journals include book reviews.

Many other library and information science journals feature material pertinent to cataloging interests. *College & Research Libraries* (bimonthly), the journal of ALAs Association of College and Research Libraries, consistently publishes cataloging related articles. Several of the other ALA type-of-library division publications and *Special Libraries* (quarterly), the journal of the Special Libraries Association, also incidentally include cataloging related material slanted to their specific audiences. *The Journal of Academic Librarianship* (bimonthly, Mountainside Publishing) is the foremost publisher of articles pertaining to cataloging among the U.S. commercially published type-of-library journals, while among the general library journals *Library Journal* (2 nos. per month, except monthly July-August, R. R. Bowker) is first. The *Bulletin* (bimonthly) and *Journal of the American Society for Information Science* (bimonthly, Wiley) carry material having theoretical and technological value for catalogers, as do the technologically directed library journals *Library Hi Tech* (quarterly, Pierian Press), *Library Software Review* (quarterly, Meckler Publishing), and *The Electronic Library* (quarterly, Learned Information, Inc., Oxford, England). The Library Association Catalogue and Indexing Group's *Catalogue & Index* (quarterly), Aslib's *Journal of Documentation* (quarterly), and *Aslib Proceedings* (monthly) are key titles for staying abreast of technical service trends in British libraries, as well as for learning the British perspective on such American concerns as *AACR 2*, the MARC formats, and DDC 19. Consulting *Library Literature* and *Library & Information Science Abstracts* periodically is recommended for uncovering items of interest in the aforementioned and other professional journals. Catalogers are encouraged to avail themselves of interlibrary loan policies which frequently make it possible to attain free, or at cost, photocopies of articles from journals not in one's own library's collection.

ERIC documents, doctoral dissertations, publications of library schools, ALA, and commercially published monographs often provide an in-depth examination of topics which either do not lend themselves to treatment as journal articles or space considerations permit journals to publish only in a summarized version. A general knowledge of the material emanating from such diverse sources is an important element of current awareness. The book reviews, listings of recent publications, abstracts, news and announcement features, and advertisements which appear in many of the earlier named journals will serve to alert catalogers to the majority of pertinent works. *Resources in Education*, the monthly abstract journal of material indexed in the sixteen clearinghouses of the Educational Resources Information Center (ERIC), National Institute of Education, U.S. Department of Education, includes the wealth of information science primary source items reviewed in the ERIC Clearinghouse of Information Resources at Syracuse University. The catalog will be available in academic as well as larger public libraries and, in many such institutions, the documents themselves in microfiche copy. *Dissertation Abstracts International* is also generally available for conducting a literature search. Titles indexed in both sources are, with a very few exceptions, available for purchase in photocopy at relatively low cost when they cannot be otherwise obtained. Publishers catalogs are usually available free or at a nominal fee. Commercial presses, of which catalogers should take particular note, are Libraries Unlimited, Scarecrow Press, Shoestring Press, Oryx Press, and Knowledge Industry Publications. The annual *ALA Publications Checklist* is free to ALA members on request. Also free on request is the annual *Publications in Print* from the Graduate School of Library and Information Science at the University of Illinois at Urbana-Champaign, where one of the most active publishing programs among library schools in the nation is in force.

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*Technical Services Quarterly*
*Tracings*

# *the adequacy of library school education for serials librarianship: a survey*

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In a 1974 survey done by Benita Weber, serials librarians expressed discontent with the training they received in library school to prepare them in this particular area of librarianship. People indicated that automation and manual handling of serials records as well as acquisitions, cataloging, selection, and indexing/abstracting were not sufficiently covered.[1]

In 1980 the American Library Association's Resources and Technical Services Division's Serials Section Committee on Library School Education conducted a survey of library schools to find out, in part, what serials-oriented courses and topics were being taught at their institutions to alleviate the problems Weber delineated. The committee members found out that eighteen of forty-five responding schools had a serials course. The courses, mostly, covered a wide range of serials operations from administration to preservation. The committee was also interested in finding out the future plans of library schools to add serials courses and/or topics. Two schools indicated plans to add serials courses, twelve to give serials topics, in general courses, more emphasis in the future. The majority of the schools also indicated a desire to change their serials course emphasis in the future with automation, collection development, budget, resource sharing, union lists, and AACR 2 as the topics needing this added emphasis.[2]

In the fall of 1984 I conducted a survey of the ALA accredited library schools to find out what strides had been made in adding serials courses and topics to their curricula (Appendix I). Sixty-two questionnaires were sent out and fifty were returned (80 percent). The survey was to determine the following: how many schools had serials courses, what specific topics were covered in the serials courses, were the courses required, what percentage of students at a given school took the course, and how often the course was offered. In addition, I surveyed the schools to deter-

mine other courses that covered serials topics and to what extent.

Four respondents indicated that their library schools will be closing within the next year. One indicated that it does not currently have a serials course but will be beginning one next year. Another responded with this most interesting comment, "I am returning your survey unanswered because we do not and have not had any class that remotely deals with the questions. Our program deals with the theory base of information creation, organization and use and aspects of administration, management and organization of information system. It is our opinion that most of the technical services skills are better acquired at the undergraduate level." I ask this person, how many people take undergraduate library science courses other than teachers specializing in library science/media?

Eighteen of the remaining forty-four indicated that they do have a course specifically devoted to serials work. One of these respondents could not answer any specific questions about the course because the instructor is on sabbatical. Of the other seventeen, all but five indicated that all of the following topics are covered in the course: collection development, materials procurement, administration, cataloging, recording of holdings, preservation, microforms, union lists/resource sharing, public service, and automation.

Of the other five, one does not include cataloging and automation in their serials course. These topics are covered in a cataloging course and an automation course respectively. One does not include collection development, preservation, and microforms and indicated that these topics were not covered in other courses. Another school noted preservation, union lists, and public service as topics not covered in their serials course. However, public services of serials is covered in their reference course. Another library school mentioned collection development and union lists as topics not covered in their serials course. However, both topics are covered in other courses. The last school indicated that preservation of serials was not covered in any of their courses.

Of the schools with a serials course, most frequently the ten topics covered were divided equally among the class time allotted for the course. However, some topics, such as collection development, administration, and public services received as much as 20 percent of class time, with automation going as high as 35 percent, and in some cases cataloging going as high as 50 percent. It seems that cataloging, automation, and collection development are the primary foci of the serials courses taught in library schools. Many of these schools also teach general courses, in these same areas, which devote some time to these aspects of serials. See figure 2 for percentages of students taking courses and figure 3 to see how frequently courses were offered.

Twenty-six library schools indicated that they do not have a course specifically devoted to serials work. However, many of the schools cover serials topics in more general courses. As you can see from figure 4 most of these 26 schools teach most of the topics with some emphasis on serials. Figure 5 gives the range of topics covered by those schools that teach only a few of the topics in relation to serials. Clearly, cataloging, collection development, and union lists/resource sharing are considered by these schools to be the most important aspects of serials control needing to be taught.

It appears that library schools are making a genuine effort to add serials-related subject matter to their curricula. The primary focus is definitely on the technical services aspects such as cataloging, automation, union listing, collection development, and materials procurement. Administration and public services seem to receive the least emphasis.

The figures indicating percentages of students enrolling in serials courses are telling. A lack of interest during library school in serials coursework is a definite detriment to the librarian who finds himself in a serials department years later. Also, since the serials topics taught in general courses are offered in such courses as technical services, cataloging and classification, library automation, collection development and acquisitions which are mostly not required, many students avoid these courses as well. Perhaps, by requiring either a serials course or a combination of several general technical services courses which introduce serials topics, library schools can insure that their graduates will be prepared for positions as serials librarians.

**Footnotes**

1. Benita Weber. "Education of Serials Librarians: A Survey." *Drexel Library Quarterly*, 11:72-81. 1975.

2. Elizabeth Hanson and Germaine Linkins. "Serials Education in Library Schools." *Journal of Education for Librarianship* 23:83-95. 1982.

**Appendix I**

**Serials Coursework Survey**

1. Does your institution have a course specifically devoted to serials work?
   No _____ If no go to question no. 6
   Yes_____ If yes go to question no. 2

2. Which of the following topics are covered in the serials course

| | Yes | No | If yes % of course time devoted to topic |
|---|---|---|---|
| Collection development | _____ | _____ | _____ |
| Materials procurement | _____ | _____ | _____ |
| Administration | _____ | _____ | _____ |
| Cataloging | _____ | _____ | _____ |
| Recording of holdings | _____ | _____ | _____ |
| Preservation | _____ | _____ | _____ |
| Microforms | _____ | _____ | _____ |
| Union lists, resource sharing | _____ | _____ | _____ |
| Public service | _____ | _____ | _____ |
| Automation | _____ | _____ | _____ |

3. Is the serials course required?
   No _____ If no go to question no. 4
   Yes_____ If yes go to question no. 5

4. What % of the students take the course?
   under 10_____
   10-25_____
   25-50_____
   50-75_____
   75-100_____

5. How often is the course offered?
   Every semester_____
   Once a year_____
   Every other year_____
   Occasionally_____

6. In addition to or instead of a serials course which of the following topics as they relate to serials are covered in other courses?

| | Yes | No | If yes, name of course | % of course time on ser. | Required Yes | Required No |
|---|---|---|---|---|---|---|
| Collection development | _____ | _____ | _____ | _____ | _____ | _____ |
| Materials procurement | _____ | _____ | _____ | _____ | _____ | _____ |
| Administration | _____ | _____ | _____ | _____ | _____ | _____ |
| Cataloging | _____ | _____ | _____ | _____ | _____ | _____ |
| Recording of holdings | _____ | _____ | _____ | _____ | _____ | _____ |
| Preservation | _____ | _____ | _____ | _____ | _____ | _____ |
| Microforms | _____ | _____ | _____ | _____ | _____ | _____ |
| Union lists, resource sharing | _____ | _____ | _____ | _____ | _____ | _____ |
| Public service | _____ | _____ | _____ | _____ | _____ | _____ |
| Automation | _____ | _____ | _____ | _____ | _____ | _____ |

FIGURE 1

SCHOOLS WITH A SERIALS COURSE

| TOPICS COVERED IN SERIALS COURSES | NO. OF SCHOOLS GIVING A POSITIVE RESPONSE |
|---|---|
| Collection development | 15 |
| Materials procurement | 17 |
| Administration | 17 |
| Cataloging | 16 |
| Recording of holdings | 17 |
| Preservation | 15 |
| Microforms | 16 |
| Union lists, resource sharing | 15 |
| Public service | 15 |
| Automation | 16 |

FIGURE 2

SCHOOLS WITH A SERIALS COURSE

| SURVEY QUESTION | NO. OF SCHOOLS GIVING A POSITIVE RESPONSE |
|---|---|
| Under 10% students take course | 10 |
| 10-25% students take course | 5 |
| 25-50% students take course | 2 |
| 50-75% students take course | 0 |
| 75-100% students take course | 0 |

FIGURE 3

SCHOOLS WITH A SERIALS COURSE

| SURVEY QUESTION | NO. OF SCHOOLS GIVING A POSITIVE RESPONSE |
|---|---|
| Course offered every semester | 1 |
| Course offered once a year | 9 |
| Course offered every other year | 2 |
| Course offered occasionally | 5 |

FIGURE 4

SCHOOLS WITHOUT A SERIALS COURSE

| SERIALS TOPICS COVERED IN GENERAL COURSES | NO. OF SCHOOLS GIVING A POSITIVE RESPONSE |
|---|---|
| Collection development | 23 |
| Materials procurement | 17 |
| Administration | 10 |
| Cataloging | 26 |
| Recording of holdings | 12 |
| Preservation | 12 |
| Microforms | 14 |
| Union lists, resource sharing | 20 |
| Public service | 10 |
| Automation | 18 |

FIGURE 5

SCHOOLS WITHOUT A SERIALS COURSE

| SERIALS TOPICS COVERED IN GENERAL COURSES | NO. OF SCHOOLS OF THE EIGHT SCHOOLS TEACHING ONLY A FEW TOPICS IN RELATION TO SERIALS |
|---|---|
| Collection development | 5 |
| Materials procurement | 1 |
| Administration | 2 |
| Cataloging | 8 |
| Recording of holdings | 0 |
| Preservation | 1 |
| Microforms | 1 |
| Union lists, resource sharing | 3 |
| Public service | 1 |
| Automation | 2 |

# formal continuing education for serials

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The topic of formal continuing education for serials, although not the most intriguing subject in the world, might qualify as the most challenging. Even trying to decide how to go about researching it was not clearly evident. As it turned out, there was only one way, and that was to search the literature for notices of upcoming seminars, conferences, workshops, institutes, and the like. Subsequently, many of these meetings are then reported by various means such as entire books or articles in journals.

Although brief references are made to describe early attempts at continuing education for serialists, in order to offer a historical perspective, the main thrust of this article is to cover the activities of recent years. The efforts for formal serial continuing education are reported in three areas: (1) within the state of Illinois, (2) within the United States, and (3) within Canada and the United Kingdom.

## Serials Continuing Education in Illinois

In the past few years serials continuing education in Illinois has revolved heavily around the workshops sponsored by the Illinois State Library and the Illinois OCLC Users' Group. The workshops entitled: "Introduction to Tagging: Serials," "Intermediate OCLC-MARC Tagging: Serials," "OCLC Online Serials Control Subsystem: An Introduction," and "Union Listing Capabilities in the OCLC Online System: An Introduction," are usually offered twice a year. The content of these courses, as might be expected, concentrates around the use of the OCLC/MARC bibliographic records and the OCLC Serials Control Subsystem, which also includes the Serials Union Listing Capability.[1]

The Illinois Library Association (ILA) Annual Conferences allow opportunities for formal continuing education for serials. In October 1977 a panel presentation entitled "The Periodical Collection in Times of Tight Budgets," was given. The need for automated bibliographic access in terms of union lists was expressed, as was the problem of not limiting service to users during times of budget cuts. Cooperative collection development was stated as ". . . the only way to go in the future."[2]

At the 1981 ILA Resources and Technical Services Section (RTSS) Spring Conference, the "Use of the OCLC Serials Subsystem at the Knox College Library" was a presented paper. In this discussion, the Knox College Library staff weighed the pros and cons of the OCLC Serials Subsystem. Unfortunately for OCLC, the cons appeared to outweigh the pros.[3]

Most recently the Illinois Library Association meeting in May of 1984 offered the program "The Serials Vendor: What Should We Expect?" Topics covered included the librarians' expectations of the serials vendor, the commercial serial vendor's perspective, and automated serials control through a bibliographic network.[4]

In October 1983 two meetings in Chicago involved serials. LACONI/Technical Services Section sponsored a program on "Serials Control and Cataloging," and AJ Seminars conducted a seminar on "Automating Serials Collections."[5]

## Serials Continuing Education in the United States

In November 1969 the Allerton Park Institute sponsored by the University of Illinois Graduate School of Library Science addressed the topic serial publications in large libraries. Papers delivered included: "The Bright, Bleak Future of American Magazines," "Serials Selection," "Serial Cataloging Revisited," "Serial Publications in Large Libraries," and "Bibliographic Control of Serial Publications." The final paper titled "Service" offered this admonition:

> There is always danger of beating a metaphor to death, but I trust you will bear with me when I say the Old Paint, the periodical, is still the workhorse of the library's stables. The thoroughbred monographs can make easier bids for attention, and even the permutated indexes are infinitely more

glamorous, but they are only the racetrack around the farm. Old Paint's form may change, he may become just a ghostly image on ultramicrofiche or a flash in the computer, but he is still essential (sic) component in the larger library. Despite his unprepossessing appearance, he is indeed a horse of another color, and a pretty faithful one at that. Libraries owe him every chance at a new pasture.[6]

The year 1973 saw the "Conference on Management Problems in Serials Work," take place at Florida Atlantic University. Such topics as "Introducing the National Data Serials Program," "The Three-Way Responsibility: Dealer-Publisher-Library," and "The Future of the Scholarly Journal" were presented. In summarizing the proceedings, Mark M. Gormley is quoted as saying: ". . . this has been a challenging and pithy conference. We, here, all realize that we face a problem of staggering proportions. We hope that some of the ideas engendered here will help meet those challenges."[7]

The LARC Institute on Automated Serials Systems was held in May 1973 in St. Louis. Glyn T. Evans in his "State of the Art Review" described the frustration expressed by a library patron attempting to access serials:

> Finally, a word from our sponsor, the user. 'I know, or think I know what a serial is when I come into the library with a citation from your information retrieval network, but then I run into trouble. You don't call it what I call it, and you don't put it where I expect it to be. Sometimes you bind it when it is at its most useful, and sometimes you follow the barbaric practice of binding it without its index. Sometimes its late, sometimes its out of print, or just plain missing. Sometimes you haven't got it, and it takes a long time to get it. But never mind; when I go to another library, they will call it something else again, and hide it somewhere different. At least I know that sometimes they will bind it without the index, like their neighbors! Why don't you librarians get the computer to help you?'[8]

Some of the specific topics at the institute were: "The National Serials Data Programs," "Serline: On-Line Serials Bibliographic and Locator," "The Problems of Entering a Computerized Serials Network," and "The PHILSOM Network."

A serials workshop was held on June 16, 1977, on the campus of Central Washington College in Ellensburg. Subjects covered were: "The Establishment of the Washington State Cooperative Storage Center and Its Implication on the Acquisition of Serials," "Serials Budgeting in a Time of Recession," and "Agency Resources in Serials: Collection Development, Serials Records, and Reader Services." A panel discussion resulted in the following methods for meeting the needs of patrons, while trying to keep within the budget: "Some suggestions were selection committees, use studies, cancellation projects, involvement of faculty and availability of materials from other libraries or institutions."[9]

The California Library Association sponsored a seminar on the deselection of periodicals in academic libraries in December 1977 in San Francisco. The need for regional cooperation for libraries experiencing diminishing budgets along with inflationary subscription costs is obvious. In a paper called "Divorce Library Style," the discussion revolved around the problems that remain after the titles to be deselected are chosen. Among these are: (1) when to stop the subscription; (2) making sure the records are changed; (3) the decision of what to do with the children, i.e., all the bound backfiles of cancelled titles. This latter is the most difficult, but sooner or later a decision must be made and the divorce action completed.[10]

The era of the 1980s greeted the "Serials Automation: Acquisition and Inventory Control Institute," which was held in Milwaukee and sponsored by the Library and Information Technology Association (LITA). The subject of serials control was approached from the historical perspective, inventory and holdings control, serials and on-line catalogs, and finally the future of serials control. Descriptions of automated serials control systems at the National Library of Medicine, Northwestern University, University of California-Los Angeles, University of Denver, and the University of Illinois were reviewed. It was at this conference that Michael Gorman uttered the unforgettable statement: "My unbelief extends to the necessity for the existence of serials. I believe that serials are an expensive and inefficient form of communication, and that they are a major factor in the decline in the quality and integrity of the collections in our large libraries."[11]

The year 1980 was a very busy one as catalogers all over the country prepared for the arrival of AACR 2 the following year. Workshops were conducted within states or regions, and LC conducted a series of institutes which covered all areas of the country. Illinois had a very sophisticated series of workshops directed at three levels of expertise from basic to intensive. This was an extremely well-planned and executed series and certainly one of the best in the country.

The implementation of AACR 2 on "Day One," Jan-

uary 1, 1981, resulted in another hectic year for serialists. The uniform title for serials was still unresolved, and the cataloging of microforms by LC, NAL, and NLM would follow AACR 1. The ISDS (International Serials Data System) continued to meet for the seventh time in October in Paris, where it reported its revised Guidelines for ISDS, which was in its fourth year of preparation, was still not available.

An institute on serial collection development in May of 1981 discussed journal user studies, management of microform serial collection, serial management budget, and access through the Center for Research Libraries (CRL). The astute conclusion ". . . that librarians can no longer merely sit back and wait for serials problems to go away," was made. Also

> In the end, the conference participants felt that they had gained something very useful from these papers and discussions: a better understanding of the problems of serials collection development, and a variety of approaches to consider in solving their own problems.[12]

A series of serial conferences were initiated in October of 1981 in Arlington, VA. The theme of the first conference was serials management in an automated age. Some of the presentations were titled: "The Journal in the Year 2000," "Playing by the Rules," "AACR 2 and Serials," "Going Online With Serials," "Order from Chaos? Standardizing Serials," "Resource Sharing of Serials," and "Automating the Serials Manager."[13]

The second annual serial conference held in 1982 in Columbus, Ohio was entitled "Serials to the People: Patron Oriented Management." Some of the topics included: "Automated Serials Systems: Putting the Patron First," "Vendor Services Supermarket: the New Consumerism," "Serial Files: What, Where, Why?" David P. Woodworth in his paper on "Serial Education: a Tentative Syllabus," quoted a conversation one of his graduates overheard:

> "What is a serial?"
> "Whatever is not a book."
> "Oh, then what is a book?"
> "Whatever is not a serial."
> "Oh."[14]

The 1983 third annual conference returned to Arlington, VA. It was entitled "Library Standards: Development, Implementation, and Discussions," and revolved around the impact of standards, developing technologies, serials and automation and education, marketing serials, and serial union listing. The conference received mixed reviews in two journals. *Library Acquisitions: Practice and Theory* said:

> . . . The serials conference had strong and weak points. There was much unscheduled time for interaction among the conference attendees, or with the exhibitors, and automated serials demonstrations were available.[15]

*Technicalities*, on the other hand, said:

> Overall, the conference was a success. The turnout was greater than expected, and the general attitude among the conferees was positive and, in many cases, enthusiastic. One small disappointment noted was the small number of exhibitors and lack of time to meet and talk with the few who were there.[16]

In May 1983, the conference "Issues in Book and Serials Acquisition: Collection Development in the Eighties" was held in Charleston, SC. Some of the topics covered were: the role of librarian, jobber, and publisher in the serials business, the library view of faculty/library relations in acquisitions and collection development, the need for faculty involvement in collection development activities, the merits and demerits of gifts and block purchases, and the obsolescence of microforms and the movement toward video disc as a storage medium.[17]

Other excellent sources for formal continuing education in serials are the annual conferences and midwinter meetings of the American Library Association (ALA). These have been reported in a variety of places over the years. The earliest appearance, in 1877, was in the first volume of the *American Library Journal*, which was the official journal of the association for many years.[18] This corresponded to the first meeting of ALA in New York of the same year. It was not too surprising to find a Committee on a New Edition of Poole's Index was established.[19] This committee assisted in the revision of a number of editions and supplements to the original work. The Council of ALA established a Committee on Union List of Serials. It was through the work of this committee that the *Union List of Serials of the United States and Canada* was published by H.W. Wilson in 1927. A Serials Round Table was established by the ALA Council in 1929, but it was not until the establishment of the Resources and Technical Services Division (RTSD) and the Serials Section in 1957 that the formal structure was clearly defined.[20] The appearance of "The Year's Work in Serials" was included in *Library Resources and Technical Services* for the first time in 1958, and has continued to summarize serial activities annually.[21]

In recent years, the *Serials Librarian* in it's "Serials News" columns has done a fine bit of reporting the programs of the various committees and discussion groups of the Serials Section, Resources and Technical Services Division of ALA. Some of the groups

reporting recently are the Committee to Study Serials Cataloging, Large/Medium Sized Research Libraries Discussion Group, Committee to Study the Feasibility of Dynamic Lists of Core Serials by Subject, Regional Serials Workshop Committee, Policy and Research Committee, Union List of Serials Committee, and Cataloging and Classification Section Committee on Cataloging: Description and ACCESS (CC:DA) in matters pertaining to serials. Some of the topics presented here have been: CONSER (Conservation of Serials), retrospective conversion and serial union lists, staffing and serials control, the National Periodicals System, selection and deselection of serials, the rising costs of serials, serials and AACR 2, using American National Standards Institute's (ANSI) standard for summary level holdings statements, automated serials systems, LC's minimal level cataloging of serial microforms, the likelihood that the ISBD(s) will be altered as a result of the International Federation of Library Associations and Institutions (IFLA) review, a comparison of the AACR 2 rule interpretation of the Library of Congress and the National Library of Canada, the United States Newspaper Project, the Association for Research Libraries (ARL) Microforms Project, the Name Authority Cooperative Project (NACO), and copy cataloging of serials.

Occasionally, an entire day or entire programs will be devoted to serials topics at the ALA conference. In San Francisco in 1981 an all-day workshop titled "In Order To Form A More Perfect Union . . . List of Serials" was held. The program focused on the creation, compilation, and production of a union list primarily, but the audience was cautioned against getting so involved with the mechanics of union listing that they may completely lose sight of those librarians who will use the final product. This workshop was cosponsored by RTSD Serials Section's Ad Hoc Committee on Union Lists of Serials and RTSD's Council on Regional Groups.[22]

In Philadelphia in 1982 RTSD sponsored a conference within a conference. Among the topics covered were: "Serials Research from the Writer's and Editor's Point of View," and "Serials Research from a Library Faculty Point of View."[23]

In 1983 in Los Angeles, the Serials Section of RTSD cosponsored with the Resources Section a program on "Journal Access: Today and Beyond," was featured as ". . . data meets its maker, and getting there (in style) is half the fun." The speakers focused on access to serials, changing format of serials, access points in indexes, abstracts, and reference data bases and preservation aspects of serials access.[24]

The Dallas convention of 1984 Serials Section program was titled "Serials Holdings: Their Use and Abuse." It included such topics as serial holdings in manual systems, serial holdings on-line, and ANSI serials holdings' standards.[25]

An entertaining part of RTSD annual membership meetings is the announcement of the annual award of the Serial Section Worst Serial Title Change for the Year. Personally, my all time favorite is the change from *Our Public Lands* to *Your Public Lands*, where the insertion of one single letter caused a tremendous amount of work for serialists whether they were catalogers or in charge of the serials check-in.

The 1984 conference saw such awards as:

Snake in the Grass Award, or Et Tu, Brute? Award:

*LJ/SLJ Hotline.*
changed to
*Library Hotline.*
(R.R. Bowker)

Worst Title Change of the Year Award, also Most Fantastic Title Change Award:

*Fantasy Newsletter*
changed to January 1984 to
*Fantasy Review*
changed in March 1984 to
*SF and Fantasy Review* (absorbed *Science Fiction and Fantasy Book Review.*)
changed in April 1984 to *Fantasy*
"Fantasy Review" still appeared on the inside of the publication, and all changes have been gradual. In fact, of the last six issues no two have been the same.[26]

RTSD is not the only ALA division which sponsors serial-oriented programs. The Association of College and Research Libraries (ACRL) presented a program at the ALA Annual Conference in Los Angeles in 1983 entitled "Periodical Selection in College Libraries: Reports of Practitioners." Topics of papers were: "From Periodicals Budget Cuts to Management Information Systems," "Limiting Periodicals Collections in an Undergraduate Library," and "A Survey of Journal Use Within the Undergraduate Library at the University of Illinois at Urbana-Champaign." The method applied in this latter survey ". . . can be easily replicated at other institutions."[27]

There are many other groups which meet regularly and conduct programs of formal continuing education for serials. Some of these are IFLA, American Society for Information Science, SLA, Music Library Association, PLA, ACRL meeting independent of ALA, Micrographics Association, MFLA, Ohio Valley Technical Services Librarians, and ASLIB, to mention only a few.

### Serials Continuing Education in Canada and the United Kingdom

A Canadian workshop held in Halifax, Nova Scotia in June of 1976 was entitled "Serials Dynamics." Areas of discussion included: "International Standard Serial Numbers and the International Serials Data System," "The Minnesota Union List of Serials," and "International Serials Cataloguing." In summarizing the proceedings, Jean Whiffen, the convener, concluded:

> Finally, the meetings on June 11-12, 1976, also confirmed the similarities between the French Revolution and what can be termed the present serials revolution. During the former, power passed into the hands of the masses, the tumbrils were full of people on the way to losing their heads, and the knitting industry was stimulated. During the latter, attention is passing from acquisitions and cataloguing to serials, the garbage containers are filling with obsolescent 3" × 5" cards, and the computer industry in Japan will undoubtedly reap the financial rewards.[28]

The Canadian Library Association Serials Interest Group's annual meeting in 1984 was reported in the fall issue of *Serials Review*. The paper presented entitled "Idiosyncracies of Title Changes" triggered the passing of the following much-needed resolution:

> . . . Be it resolved that IFLA be approached to form an International Committee for Title Changes (ICTC) with national and regional branches in every country to formulate standards for serials titles.[29]

The United Kingdom Serials Group (UKSG) was begun informally by publishers, subscription agents, and librarians after the 1975 Blackwell's Periodicals Conference.

The Second Blackwell's Periodicals Conference on economics of serials management was held at Trinity College, Oxford in March 1977.[30] Following this meeting, in April 1978, the United Kingdom Serials Group was formally organized at its first annual meeting at York University, and has continued to meet on a regular basis since then.[31] In addition to the annual meeting, it also sponsors courses, and publishes a semiannual newsletter and a monographic series. Some of the subjects covered over the last several years have been: financing serials from the producer to the user; automation and serials; resource sharing: its impact on serials; serials 2000; serials education and training; and serials deselection.

The Sixth Annual UKSG Conference, titled "Automated Serials Control," held in 1983, was especially renowned for its immortal quote: "Serials control is like trying to nail jelly to the wall."[32] Its most recent conference, held in March of 1984 in Surrey, England, was billed as the First International Serials Conference. David Woodworth delightfully describes the atmosphere of the conference:

> It was with very great pleasure that we were able to welcome so many foreign visitors this year, especially the twenty-strong group from the States who had braved the rigors of their travel arrangements to be with us. Even the central heating system expressed a welcome with loud and continuous banging for the duration. It's no wonder that our friends from the colonies consider us Dickensian![33]

### Conclusion

Although this article has not attempted to be a definitive work on the recent formal continuing education for serials, the variety of conferences, institutes, symposia, meetings, seminars, and conventions attest to a respectable amount of activity in Illinois, the United States, Canada, and the United Kingdom. Surveying the topics of the papers presented at the above-mentioned groups, certain subjects appear more often than others. In the selections reviewed in this article, the leader by far was automating bibliographic access to serial titles and holdings, followed by topics relating to serials cataloging (no doubt closely linked to title changes). The next most popular area was serials acquisitions, including selection, deselection, and working with (or around) vendors. This was followed by the future and possibly changing format of serials, and cooperative collection development, necessitated by rising costs and tight budgets. The future of serials has become an important subject in recent years with the imminence of such technical wonders as electronic publishing, full-text on-line, and on-demand publishing. However, in his book *Libraries and Librarians in an Age of Electronics*, F.W. Lancaster predicts that existing periodicals will not reach the 25 percent level of conversion to on-line availability until after the year 2000. If this proves to be true, the serialist still has many years ahead of acquiring, checking-in, budgeting, paying for, cataloging, dealing with title changes, accessing and locating, preserving from theft and mutilation, and managing the serial collection.

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# *informal continuing education for serials: keeping up with the journal literature*

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It is a truism that serials librarians usually learn their job on the job. Library school courses, like cataloging rules, have traditionally focused on books, with serials tacked on as an addendum. And yet there are many serials specialists in the field, either working in a formal serials department, or simply acting as the house experts in serial cataloging or serial control.

Serials keep changing (and therein lies their special quality), and so does the world of their bibliographic control. For instance, almost everything you ever knew about the rules of cataloging entry for serials went out the window with the advent of AACR 2 and the subsequent Library of Congress rule interpretations concerning uniform titles. Your paper check-in files, payment records, and holdings cards may soon be blown away in the winds of automation. Direct electronic links to your dealers may soon replace your paper order records. Serials people need to keep up with a changing world as much as they need to keep up with title changes.

One of the ways to keep up is to read the current journal literature to find out what has happened, and what is going to happen, in serials control. No one knows better than a serialist how many journals there are and how little time one has to read them all. Moreover, in any issue of any one journal there may be only an article or two that directly addresses something you want to know about serials. Which ones should you read? This article suggests some likely high-yield current periodicals that contain articles on the handling of serials, reports and announcements on meetings concerning serials, and pointers to other articles and books on serials.

## Working Tools

Several publications, themselves issued in serial form, constitute working tools for the serials librarian. *Cataloging Service Bulletin*, issued by the Library of Congress, is one tool you cannot do without. All the rules for formulating uniform titles for serials and for providing the necessary levels of description for

serials have been issued as rule interpretations in *CSB*. You can't catalog serials without it. You need not only to read it, but, if you are a cataloger, to annotate it, abstract it, and keep it on your desk like a Bible. The OCLC *Technical Bulletins* need to be scanned for those that deal with aspects of MARC tagging applicable to serials, and those bulletins kept and used (or the information transferred elsewhere) by catalogers and inputters. The *Information Bulletin* issued by ILLINET/OCLC Services of the Illinois State Library contains instructions for ILLINET users that transmit or forewarn of official changes in the use of the various OCLC subsystems. It is another publication you cannot do without if you are an ILLINET member. And, of course, there are the various bulletins or informational print outs issued by the various subscription agencies like Faxon, Ebsco, and others, which are working tools for serials order, check-in, claims, and invoice personnel. They forewarn of publishing delays, title changes, ceased titles, and all kinds of other things you need to know to keep your serial records up-to-date. Check what your own vendor(s) produce in this line and see that the information gets to the proper personnel.

**What's Happening?**

While the Library of Congress was feverishly issuing instructions, guidelines, and rule interpretations prior to the adoption of AACR 2, people who were able to attend ALA or one of LC's traveling "road show" workshops were the only ones who knew what was going on with serials cataloging. Co-workers who had to stay home waited on the edge of their chairs for the latest word from the conference attendees. Not every year is so fraught with excitement, but there is no doubt that attendance at meetings, especially those of ALA, is one of the ways to find out what is happening in serials.

The Resources and Technical Services Division of ALA is the one that contains the Serials Section. The Resources and Technical Services Section of ILA is the corresponding state body, but has no separately organized serials section. Getting on a committee of one of these bodies is a way to actually affect what is happening, if only in a minor way. Attendance at the meetings gives you a chance to find out how other serials librarians are solving their problems. Often one comes home with the reassurance that "We're coping about as well as the next library."

To find out where the meetings are, and what happened at them if you could not attend, is one of the reasons for keeping an eye on the periodical literature. *American Libraries*, the official bulletin of ALA, has full information on the annual and midwinter ALA meetings, including housing registration forms (look in the January issue for summer registration, in the September issue for Midwinter). A column called "Datebook" lists other upcoming events and workshops. *RTSD Newsletter* highlights the upcoming programs and meetings of RTSD, including the Serials Section committee meetings and discussion groups which will be held at ALA, so that you can pick out the meetings of particular interest to serials and allied technical services.

In Illinois, the *ILA Reporter* announces the meetings of ILA, and *Tracings*, the newsletter of the Resources and Technical Services Section, highlights the technical services meetings. Both the *RTSD Newsletter* and *Tracings* report on the committee structure of the respective bodies, on elections and appointments to offices and committees, and report short news items on happenings in technical services. Both include a form each year for committee volunteers.

*Library Journal* has a column called "Calendar" which announces meetings around the country. Look for workshops and meetings on serials. *LJ* often runs articles on the restaurants and tourist attractions available in the cities in which ALA is going to meet which can help you plan your extracurricular convention activities.

**What Happened?**

If you can't get to the meetings you can find out what went on in several places. *RTSD Newsletter* publishes the reports of the RTSD board meetings and those of the RTSD committees and discussion groups. Look for the Serials Section reports and those of allied sections like Cataloging and Classification. The reports are taken from the official reports filed by the chairpersons of the committees. The "Serials News" column of *Serials Librarian* also contains complete reports of the ALA serial meetings at both the summer and midwinter conferences, also prepared by the chairs of the committees.

The *Library of Congress Information Bulletin* also contains extensive reports on the ALA conference meetings in its Appendix section. These reports are written by LC staff members and provide a different perspective. Look for the reports on the Resources and Technical Services Division, especially the serials meetings, a month or two later than the ALA meeting. The Appendix is also used to report on other conferences such as those of IFLA or the Special Libraries Association. Sometimes there is serials information there, too.

*Library Acquisitions: Theory and Practice* usually has relatively long reports on the Acquisition of Library Materials Discussion Group, the Booksellers Discussion Group, and the Automated Acquisitions/In-Process Control Systems Discussion Group at ALA. These reports are written by LATP staff members and may contain information relevant to serials acquisition.

Look in the January/March (or, lately, the October/December) issue of *Library Resources & Technical Services* for the annual reports of the RTSD sections. Not only the report of the Serials Section, but also those of the Cataloging and Classification Section, the Preservation of Library Materials Section, the Resources Section, and the Reproduction of Library Materials Sections may have material of importance to serials.

Don't miss the annual overview articles in *LRTS*. Look in the July/September issue for "The Years Work in Serials," and other "years work in" articles on cataloging, preservation, resources, and reproduction of library materials. These articles cover the major developments that have occurred over the preceeding year.

**Articles and Books on Serials**

Articles on serials may turn up in a variety of journals, not just those devoted to serials or technical services. A good starting place for a retrospective bibliography covering all aspects of serials handling is in Marcia Tuttle's *Introduction to Serials Management* (Greenwich, CT: Jai Press, 1983). Nearly a third of this recent book is devoted to an annotated bibliography of books and articles about serials. The bibliography, divided into "Working Tools" and "Research Tools" (each section further subdivided into specific categories) is a concentrated list of serials literature which can help to fill in what library school may have left out in your basic training in serials. While weak in automation, it covers most of the other aspects of serials handling.

The Library School Education Committee of the ALA/RTSD Serials Section has collected a yearly bibliography of articles and monographs on serials since 1980. Selective rather than exhaustive (the aim is to provide information that will aid library school education in serials), the listing includes reviews of articles and books published during the preceeding year. The first *Annual Bibliography of Articles and Monographs on Serials* (Chicago: American Library Association) was published as a separate by ALA in 1980. Since 1981 the yearly bibliography has run as a "Special Feature" in the fall issue of *Serials Review*. *Serials Review* is also a general source of reviews of publications on serials. Note especially the "Tools of the Serials Trade" column which covers publications on serials.

The "Serials News" column of *Serials Librarian* announces and provides extensive descriptions of recent publications on serials written by the contributors of the announcements. New Library of Congress publications, some relevant to serials, are announced in the *Library of Congress Information Bulletin*.

**Journals**

While there are many journals that a professional librarian can profitably scan for articles on a variety of library topics, some journals provide a relatively higher yield of serials articles than others. A short list of these is discussed below (in alphabetical rather than high-yield order).

*Cataloging & Classification Quarterly* contains signed articles and some book reviews on cataloging and classification. The emphasis is not on serials, but watch for whole issues on serials themes. Volume 1, number 1-2 was devoted to "The Future of the Union Catalogue," and volume 3, number 2-3 was devoted to serials, with a whole section on serials management. Keep scanning this one — there may be nothing on serials for a while, then a lot.

*Information Technology and Libraries* (formerly *Journal of Library Automation*) is the official journal of the Library Information and Technology Association of ALA. It contains articles of standard length and also many short informational articles subsumed under the column heading "Communications." The titles often read like alphabet soup — "UTLAS-Japan Link," "WLN/RLG/LC Linked Systems Project," "PERLINE at Risley," "MITINET Retrocon," etc. The concentration is not on serials, although they are not forgotten. The emphasis is on automation, and as serials control becomes automated serials librarians need to keep up with the current technology. Look for articles on the system you have or are going to acquire, as well as for articles of general interest.

*Library Acquisitions: Theory and Practice* contains signed articles which are, however, often short and not footnoted. It is relatively rare to find an article specifically on serials acquisition or deacquisition. However, reports by LATP staff members on ALA meetings concerned with acquisitions are substantial and often contain information as useful, or at least interesting, to

the serials order process as to monographic ordering. Dual pricing issues and the viewpoints of publishers and vendors that emerge from these meetings are two such topics.

*Library Resources & Technical Services* is the official journal of the Resources and Technical Services Division of ALA. Each year it publishes the annual reports of the sections of RTSD, including the report of the Serials Section. Each report is written by the current chair of the section. Look in the January/March or the October/December issue for these reports. Look in the July/September issue for "The Years Work in Serials" and similar overview articles on cataloging, preservation, resources, and reproduction of library materials. As a scholarly journal, *LRTS* contains refereed articles on a variety of technical services subjects, including serials. Between 1980 and 1983 less than a handful of articles appeared on serials, but the January/March issue of 1984 was devoted almost entirely to holdings record structure and electronic publishing, two topics of serial interest. Do not give up looking for serials articles, and be sure to see the annual report and "years work" issues.

*Serials Librarian*, a journal devoted specifically to serials, contains a range of scholarly articles on the technical services aspects of serials. Typical topics covered in recent years have been serials control systems and automation, subscription agents and other acquisitions matters, and some articles concerning cataloging. A column called "Into the Hopper," by Joe Morehead, covers interesting aspects of government document serials. A regular feature is the "Serials News" column edited by Gary Pitkin. It contains extensive reports and announcements under four subheadings: Networks/Consortia & Library Oriented Organizations; Library Schools; Vendor/Publisher Services; and Libraries. The content is supplied by the contributors of the news items. Summaries of recent publications, and complete reports of ALA serial meetings appear in the "Networks/Consortia . . ." section. Descriptions of new products and services appear in the "Vendor/Publisher" section. Scan this journal both for articles and for these "Serial News" items.

*Serials Review* originally began as a selection tool, containing evaluative reviews of all kinds of periodicals (not just those concerning serials). It has become a more generalized journal with articles and informational reports on various aspects of serials librarianship as well as reviews. The bulk of the reviews now appear in a "Reviews & Recommendations" section, and are written around a theme such as the periodicals from a particular state, or periodicals on a particular topic. The layout and readability of this journal is improving. Scan the column titles as well as the article titles for material of interest. All the essay articles are refereed.

Since 1981 the yearly bibliography of articles and monographs on serials prepared by the Library School Education Committee of the ALA/RTSD Serials Section has run as a "Special Feature" in the fall issue. A "Tools of the Serials Trade" column reviews publications about articles. *Serials Review*, like *Serials Librarian*, is a publication you will want to keep up with, since it is devoted specifically to serials.

Do not forget to scan general periodicals. *Illinois Libraries* is a case in point. This journal, like *Library Trends*, devotes each issue to a specific topic. There may be nothing on serials for long periods of time, and then an issue, like this one, may appear which is devoted to a technical services subject including serials.

**Last Thoughts**

There are a number of excellent library journals which may also publish articles of interest to you as a serialist, or simply to you as a professional librarian. And, as we all know, new journals appear on the scene all the time. A new journal from Haworth Press called *Technical Services Quarterly* looks like it might turn out to be another good one for serials. I have not yet had a chance to see an issue of it. Keeping up with what is happening is a matter of constant contact with other serials librarians, who will tell you about new publications, as well as constant scanning of the current literature.

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# *technical services education for school media specialists*

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"What does a school media specialist need to know about technical services?" While this question may be asked by media specialists themselves, it is more often raised by library school professors and especially the technical services instructors. The technical services professors are specialists, and they raise the question so that they may tailor a course to identified needs. No matter the answer, e.g., "L.C. Headings" or "OCLC login," almost any response brings the immediate comeback, "Why? Why do school library media specialists need to know that?" This article presents answers to both questions, "What?" and "Why?" The answers begin with "Nothing" and expand to "quite a lot."

To begin with the lowest in the range, "Nothing," the argument is proposed that it is easy to buy materials from publishers and vendors who furnish cards for free or for a small fee. The assumption is made that all materials for the media center are provided with catalog cards which are complete. No additional subject headings or analytic cards would be required. Considering how small most school library budgets are in 1984, it could be considered very practical, and not necessarily restrictive to collection development, to limit purchasing to the materials available from those publishers or vendors who do furnish catalog cards, especially in elementary schools.

The media specialist with such a small budget that purchases could be satisfied from vendors who supply cataloging would probably have little if any clerical help. These persons do not have time to do much more than reshelve items that are returned by students and teachers. Also, some media specialists have responsibility for more than one school, and they do not have time to notice if a book doesn't seem to be in the right section of the library much less the luxury of time to catalog the material in the first place. If polled, these persons might consider that they do not need to know much about cataloging, and little knowledge of filing rules is all that is needed to maintain the card

catalog. Not all media specialists worry about filing rules. The author recently heard of a high school where the clerk does all the filing into the card catalog with no one reviewing before the cards are dropped. It was a surprise to the clerk to learn that patterns existed for the placement of cards in those drawers and that some system of filing might be appropriate. It is no small wonder that few people are able to locate materials in this media center.

School library media specialists may also work in school districts with centralized processing centers. All acquisitions, cataloging, and processing of new materials is done centrally. Again these persons would perceive of little, if any, need for technical service skills.

The next level in the range would be "a little," those persons who take a single cataloging course in their academic program and then accept a position where they purchase most items with cards available while exercising, sporatically, their cataloging skills. In locations where clerical assistance is available, responsibility for processing materials with cards and even some simple cataloging may be delegated to the clerk with the more challenging materials being cataloged by the media specialist. These media specialists may have more time to review commercial cards and may not consider that the subject headings assigned by these vendors or publishers meet the needs of the card catalog user in their library. They analyze the placement in the classification system to see if it would make sense to children looking for a particular topic and would ease locating materials for curriculum units. For this reason, their response might be, "just a little, at least how to catalog using Dewey and Sears in case I really have to process some book or record given to the media center, or I get a free filmstrip." For this media specialist, a crash introductory course would seem to be enough for changes in AACR 2 or filing rules have little actual influence on what happens to the card catalog once formal education is complete.

In situations where two or more professionals work in a media center, virtually nonexistent below middle/junior high school, the technical services aspect is usually assigned to one professional. Media specialists in these schools, which are more often larger with more students and teachers, have larger budgets and buy more materials. The materials would be more diversified and might be less likely to have commercial processing available. For the media specialist with assigned responsibility for technical services, the response to "What?" would be, "Something more than general; some specialized needs exist." Effort is made to keep up with the changes: AACR 2, new editions of Dewey and Sears, and filing revisions. The cost benefit of automated ordering might get their attention if they were made aware of the possibilities. However, school personnel who work nine months, who are responsible for additional tasks in the management of the media center beyond technical services, and who work closely with teachers and students in integrating materials and services into the school's curriculum find it difficult to keep up with these changes which go beyond the basic technical services information they received in their college program.

Professional associations attempt to fill the gap through programming at workshops and conferences. However, this topic is usually not as appealing as other options in the conference program, and the sessions are seldom attended by large numbers of media specialists even though they should be made aware of such modifications. This leads to a different response to "What?" The media specialist needs a strong theoretical base.

A strong argument can be made to respond to a critical need which exists for school library media specialists to gain this base as well as to receive practical information. Specifically, in the local school the media specialists need to know how, after making their selections, they order and acquire materials. They must know how to catalog and classify correctly using the accepted format and system and how to process materials for use by students. If there is no knowledge of the way materials should be cataloged, classified, and processed, it is very difficult to understand or decide when a "rule" can be bent or ignored. Students who move from one media center to another through relocating in another school district or through promotion from one grade level to another should have some familiarity with the retrieval system in their new school. A certain consistency in what might be found in the card catalog or other locating device in another information center could give them a sense of security. A recent speaker, not a librarian, mentioned how her grandson was thrilled to report that his favorite book was in the same place in the library in North Carolina that it had been in his library in New York.

The critical need to understand more than a little cataloging may not be related only to job opportunities for media specialists in local schools. Beyond the need for correctness and consistency in a school media center are the personal needs of the media specialist who may not go to work in a school. Most beginning students who choose to take cataloging do so in a general cataloging course rather than one which is specific to the school library media center. This means that they have an introduction to both classification systems and standard cataloging rules. While few school media centers use Library of Con-

gress classification, and this information may seem unnecessary, persons graduating from library education programs do not know exactly what job will be available to them immediately or in the near future. For this reason it is important for persons taking a course in cataloging to be given a general course rather than one which is type-of-library specific. When a position is available in a college, university, or public library, the library media specialist will not be considered ill prepared for a beginning technical services position.

Positions of responsibility are also available beyond the single school media center building level position. Understanding basic cataloging and being prepared with advanced courses in technical service can be very valuable to media specialists, particularly if they aspire to district level supervisory positions or plan to move into a consortium or an intermediate unit or regional media center. These positions have wider responsibility for maintaining more and different types of materials such as video or film collections, materials on all levels rather than elementary or secondary alone, as well as a much larger professional library collection than would be found in a single school.

Persons in supervisory positions may manage central processing centers which require careful maintenance of union lists. It will become the responsibility of this supervisor to help the building level school media personnel keep up-to-date with technical processing modifications so that locally acquired materials will be standardized in and beyond the district. In-service training sessions for both professionals and clerical staff must be planned. If the supervisor does not keep up, it will be difficult to know when to organize such workshops, much less be able to conduct them.

A last reason for school library media specialists gaining as much technical services information as possible in their education programs and in their continuing education is the need for media center collections to be added to bibliographic utilities. Standardization of bibliographic entry is critical to becoming an integral part of networks and to facilitate interlibrary loan. This access to all collections is essential in 1985. School library media centers have not always been considered for membership in networks.

For a long time, the role of the school library media center in any network was not perceived as a major one. The times when school library media centers are closed during the evenings, weekends, and summers, makes access to the collection limited. It was thought that school collections would be of little interest to patrons in other types of libraries. However, this has not proven to be the case. School library media collections with their larger audiovisual materials components as well as the variety of periodicals have been welcome additions to state and national data bases. Research points out that media collections in schools have far more unique titles than had been anticipated. In a study by Altman,[1] it was found that a large percentage (48.1 percent of all noncore school titles) of the titles in any high school library media center were unique to that center when compared to other high school collections in adjoining counties. In placing the Eau Claire schools on the Wisconsin data base, it was found that the Eau Claire records contributed 12,938 unique titles to the already established data base of 1.4 million.[2] In addition, schools have excellent media collections and in-depth professional education collections. This has led to the desire to encourage school personnel to join consortiums and networks.

Belonging to a network and sharing resources is the wave of the present and this wave includes all types of libraries. Since it is necessary for units joining networks to have a standard bibliographic format for the development of union lists or on-line search systems, it is imperative that school library media specialists adopt Machine Readable Catalcging (MARC), the nationally accepted, standardized format, for entry of all bibliographic records in the media center collection. Media specialists should be planning for retrospective conversion of their existing records with the same sense of urgency felt by academic, public, and special librarians. Standardized bibliographic entry, retrospective conversion, and network membership signal the need for a more than casual technical services education for school library media specialists.

The original question, "What does a school library media specialist need to know about technical services?" has been answered in levels of information. Library media specialists need to have a great many technical service skills. Among these are the following:

1. A theoretical base for activities within a technical services department. School library media specialists who work at the individual building level may be, by necessity, a jack-of-all-trades. Acquisition and processing of books, serials, periodicals, and audiovisual materials may be their total responsibility with little or no consultant help.
2. An understanding of the cataloging and classification process for the organization of all types of materials. This understanding must have a theoretical base as well as practical applications, and an awareness that these skills will require regular attention or they will stagnate. When

materials are not well arranged and accessible, users will be seriously handicapped when trying to locate information in their library media center.

3. Up-to-date information to make decisions concerning changes in cataloging, assignment of subject headings, filing, or retrieval of information. This information should be provided by professional associations especially when other avenues are not available. When regional and state consultants can provide in-service education, it is likely that opportunity for updating technical services skills will be available. In locations where this type of staff development is not provided, the professional association must fill the gap.
4. Knowledge of the various technologies available to manage technical services processes. Keeping up with changes in technologies is a part of current awareness in the literature. If media specialists do not have access to such literature, this must be provided for them by others. Vendors may be available to demonstrate one product. Good choices can be made only when there is an awareness of several methods and the advantages and disadvantages of each.
5. The necessary skills to provide assistance to persons doing all phases of clerical jobs connected with technical processes. No media specialist should be involved with clerical tasks related to acquiring or processing media center materials; nor should clerical staff be expected to make major decisions in this area. They must be given direction. New staff must be trained when turnover in personnel occurs.
6. An awareness of what a network is and how to become an integral part of any available network. This may be provided by regional or state level agencies and network personnel. Again, in the absence of appropriate agency support, the state professional association may be required to offer appropriate assistance at many levels including awareness of services, information about joining, how to help govern, and how to ask for additional services.
7. Enough technical services expertise to discuss the needs for organizing and retrieving materials to any audience, the school administrator, other school library media specialists, network managers, jobbers. It may be that the publisher or jobber should be planning changes in processing. Building level media specialists must be alert when catalog card providers do not make the needed changes in format. They may need reminding of the need to do so. Also, when a vendor provides inadequate cataloging, the media specialist should suggest appropriate corrections. Network membership requires a new set of information needs in the area of group dynamics, leadership, technology, and library applications.
8. An understanding that the needs of the school library media specialist are not unique, that school media collections are important and should be shared with a wide audience. To do this it will be imperative that records of holdings of schools be in machine readable format that is compatible with other agencies with materials to share. At some point in the education of school library media specialists, it is necessary to convey the concept of the importance of this large segment of the profession of librarians to the library community. Becoming a part of interlibrary loan systems is a two-way process, and, while this is not necessarily a part of the technical service process, it is a major plank in the technical service outcome.

Technical service education for the school library media specialist should include a component called "Preparation for the Immediate and More Distant Future." Many libraries are on-line. Catalogs are closing in favor of access through electronic terminals. School media centers are joining their local public library in an automated circulation system providing instant access to all connected collections. The flexibility to accept change cannot be taught nor legislated. However, the school library media specialist should be given the encouragement to anticipate radical innovation, to analyze the affects on the retrieval of information, to calculate the amount of information which may be retrieved using the new system, and its ultimate implication for the future, so that all decisions to accept, implement, or reject are done by using the best planning skills and most effective information which can be secured. This is taught to school library media specialists in technical services courses in their training programs.

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# *library/media specialist education: planning for 2000 and beyond*

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Those responsible for preparing library/media specialists today have a most difficult task. Declining enrollments, inadequate budgets, limited facilities and equipment, frustrated faculty, and the array of concerns generated by technology contribute to the complexity of the task. It is further compounded by peripheral difficulties such as insensitive administrators, campus politicians, and policies/rules/procedures which reduce the ability of persons involved to chart their own course. Territorial rights often become stumbling blocks for programs responsive to particular needs. Accreditation, the region served by a College or University, and even courses taught within a program frequently generate questions of territory which must eventually be addressed.

Preparing the library/media specialist for a successful career which will extend into the next century requires a very delicate balance of professional qualification, political astuteness, and personal dedication by each one having a part in a given program. Success will be determined by those responsible for the implementation of the program, and the degree to which they reflect a team effort in realizing program goals and objectives.

Given the task of preparing library/media specialists with its inherent difficulties, and the enormous responsibility of educating the professionals with skills and foresight necessary to be successful, let's look at where we are, where we should be going, and what we should be doing about it.

*Where Are We Now?*

First, where are we now? What have been the primary factors that have led us to this point? Over which of these did we or could we exercise control? One could provide extensive data and develop cogent papers on these issues, but that is not our purpose. Rather, we will attempt to highlight these circumstances, and then address the issue of preparing the library/media specialist for 2000 and beyond.

Few if any professionals associated with library/media programs in Illinois colleges and universities are comfortable with their "place" on campus. They are concerned with the array of problems enumerated earlier in this paper, frustrated by attitudes of faculty peers with perhaps less to offer in their own programs but with more political influence on campus and, in some cases, threatened with extinction. In terms of growth, library/media programs nationwide are at best holding their own. Many are being integrated with other disciplines and subsequently suffering "death by attrition." We are endangered, to say the least.

What led us to this point? Funding (or lack of it) certainly played a part. This affected faculty/staff attitudes and morale, which in turn has triggered a shifting of enrollments to more "dynamic" disciplines. Declining enrollments impacted the funding problem, making the downward spiral complete. There were and are numerous off-shoots of these factors which warrant attention, but again, it is not our purpose to address them here.

Over which of these did we or could we exercise control? It appears that we did not effectively exercise control over any of these factors mentioned. Whether or not we could have is a moot point. We did not.

*Where Should We Be Going?*

This is our next major question requiring an answer. The difficulty rests in determining how to answer it correctly. There has been a preponderance of articulate judgement calls made by many wise and dedicated leaders in our field. The literature abounds with thoughtful and prudent suggestions, each offering a slightly different approach, and perhaps direction, that should be taken. If we choose the literature as our

source for a sense of direction, we may very well find ourselves going in many directions at once.

Another approach might be the retreat route, in which we take the faculty on a weekend retreat, and brainstorm ideas until we arrive at consensus on the direction to take. It might work — but it might not. There *could* be a dominant voice which could lead the majority astray!

A frequent approach, which at least provides lip service to an honest effort, is to assign some junior member of the faculty the task of surveying recent graduates to gain information which reflects a response. This might work — but it probably will not. The faculty member may be unfamiliar with appropriate survey instruments. Most are!

The missing ingredients in most efforts to determine the direction a program should take focus on the areas of completeness (that is, a genuine effort to identify and address all of the issues which may influence the direction) and desire (that is, those intangible factors which stir and excite the graduates in such a way that they are anxious to make their contribution to the profession).

Ultimately, the answer to the question rests within the program for which it is being asked; the faculty responsible for its implementation, the students it serves, and the employers of its graduates. A thorough analysis of each is necessary, together with a careful review of the literature, if an appropriate answer is to be found. It would almost assuredly be unique to a particular program and be unlikely to "fit" any other.

*What Should We Be Doing About It?*

This last question is one which leads us to attempt a "thoughtful and prudent suggestion" as often provided by some of our more articulate colleagues. We will offer instead what is meant to be an approach which incorporates a number of different ways to address the question of what to do. Space does not permit the luxury of detail desired with regard to each point, but perhaps an opportunity to address particular areas of concern will be afforded in future issues.

**Analyze Needs**

At the risk of oversimplifying the process, we believe a program which adequately prepares library/media specialists for 2000 and beyond will reflect an analysis of needs which thoroughly considers every facet of academic/experiential preparation necessary for a graduate to succeed. Ideas and suggestions of the leaders of the field should be included, as well as the thoughtful and considered opinions of the faculty. Former students' ideas merit consideration too. They may tell us something we would rather not hear, but it behooves us to listen, and listen carefully.

Kevin McGarry suggests that ". . . those who educate for the professions must face certain basic problems. They must define the professional's role in clear and coherent terms; identify the tasks and purposes that are logically entailed by this role and then develop these empirical findings, common sense intuitions and theoretical constructs into an adequate programme."[1] Sound familiar? Of course it does!

The critical issue throughout the process is to come to an intelligent conclusion about that which makes up an adequate program. "That" cannot be identified without a thorough and complete needs analysis which is devoid of those factors which make it fit something it really shouldn't.

**Determine Objectives**

Given a needs analysis which reflects legitimate and accurate input, and which is as untainted as possible, the library/media faculty must establish immediate and long-range objectives with timelines. Caution should be exercised to avoid extremes, either toward specificity or generalizations. Every effort should be made by all concerned to strive for excellence in the program's objectives.

They should address each need identified in specific and realistic terms. They will necessarily attend to the constraints which influence the success of the program. Some objectives will attend to financial, administration, facilities, or other needs which enable the program to be implemented. Others will deal directly with the outcomes of the program itself. All are (or should be) ". . . influenced by and responsive to the needs of the environment to be served; selected and adapted for appropriate levels and situations; arranged in special sequences for (implementation) purposes; and planned to include assessment and evaluation procedures."[2]

**Develop a Plan**

It is at this point that breakdowns in what might otherwise be excellent programs frequently occur. Inordinate numbers of planners have scrupulously attended to each detail of the analysis of needs and subsequent objectives. However, it has been rather common for

the development of the plan based on needs and objectives to reveal flaws and possibly result in discouragement. Too often, the tendency is to give up and go back to what has been done -- nothing. The attention to detail given analysis of needs and objectives must also be given to the development of a plan. If it is designed to meet the needs identified and achieve the objectives specified — all of which are rather precise — then it must be precise too.

Two other points should be mentioned regarding the development of a plan. First, it is important to build flexibility into the program. However conscientiously needs may have been analyzed, or objectives written, there may have been some oversights or errors in judgement. The program plan must be subject to refinement at any stage of the process, from needs analysis to evaluation. Resistance to revision based on appropriate feedback can and probably will defeat the whole effort. Look for errors in judgement up to this point. Our expertise is in our discipline, *not* in planning! Be open minded. There is nothing wrong with being wrong, unless we haven't the courage to admit it.

The second point is to develop the plan around the needs identified and objectives specified, *exclusive of constraints*. Remember, we are working to prepare library/media specialists for 2000 and beyond, and we want to be certain we have developed a plan to achieve that purpose. Realistically, we know that there will be some constraints which cannot be ignored, and we must accept them. For example, available faculty and their strengths and weaknesses will affect what can be done now, and in the future. Their age and mobility may have an influence. Facilities and budgets reflect physical and fiscal constraints, and have impact on any program plan. Organizational/administrative structure may be favorable or unfavorable, depending on the existing situation at any given campus. There are other constraints which will affect a program plan designed to meet the needs of library/media specialists. The point is to encourage attention to every constraint, and initiate effort to neutralize each one.

Inherent in any effort to identify needs, write objectives, and develop and implement a program plan is a competent faculty with compelling ideas, a spirit of compromise, and unanimity of purpose directed toward a common goal. In other words, throughout this total process, a team effort must prevail.

Heretofore, everything that has been done has primarily involved the faculty and administration. Student input has been limited to a part of the needs analysis. Given a program plan which is based on needs identified, and objectives derived from these needs, we are ready to implement the plan.

**Implement the Plan**

The most difficult part of preparing the library/media specialist is behind us. Now the fun begins. We can now test our efforts, and determine how successful we were in planning the program up to this point.

Close attention to the students' success should now be uppermost in our minds. If we are able to identify students' problems with our program, let's try to find the cause. (To fall back into the old rut of routinely blaming students for their shortcomings would be counter productive.) Perhaps there are some modifications which could be made to alleviate these problems. More than likely, any changes necessary will be minor ones.

Two factors are critically important in implementing any program plan. First, those responsible for implementation must follow the plan! A true assessment, which follows implementation, cannot be accomplished if each individual chooses to make minor modifications in the program plan. Each member of this team effort must be aware of what every other member is doing. The program plan is everyone's road map, and the routes chosen by the team should be followed.

The second critical factor in implementing the program is objective observation and evaluation. Earlier, we suggested a spirit of compromise as an important element of any team effort. The point here is to avoid the temptation to observe or evaluate subjectively, in order to affirm an idea which may have been rejected earlier. Anything less than our best professional observations/evaluations is inadequate, and may limit the success of our effort.

**Evaluate the Plan**

Finally, we are ready to evaluate our efforts. No doubt the most rewarding stage of our effort, evaluation should be as thorough and comprehensive as was our needs analysis. We recommend every effort be made to determine, on a continuing basis, the deficiencies of the program. With continuing evaluation, persistent efforts can be made to overcome deficiencies identified.

Experienced college faculties know things change slowly in higher education, but only a few have realized the benefit of accumulated data in promoting

change. There is a natural tendency to express the need for program changes without providing substantiating evidence to support the idea. However, one need not look too far to see the effect of good planning, a cooperative faculty, and excited students. It is reflected in the programs in which issues which affect their direction have been addressed, and in which those intangible factors which stir and excite students are present.

**Summary**

Preparing the library/media specialist for 2000 and beyond is a difficult task, but not impossible. Our field of library/media services is more dynamic than ever before, and the excitement our future holds for us is something that must be shared with enthusiasm.

There are no simple answers to preparing students for this exciting future. There is however a process which, with a lot of hard work and team effort, will provide a sense of direction that is close to the mark. In its simplest form, that process includes, (1) an accurate assessment of immediate and long-range needs; (2) a set of reasonably specific objectives which attends to each need identified; (3) a program plan based on objectives derived from needs identified, with realistic attention to constraints which cannot be overcome; (4) implementation of the program as planned, without modification unless agreed to and approved by the whole team; and finally, (5) thorough and comprehensive evaluation and revision.

The most difficult of all the tasks involved in planning, developing, and implementing a successful program is that of sustaining a unanimity of spirit — a team effort — throughout the process. Dynamic leadership will help, of course, but more important is the attitude of each member of the team. One bad apple can damage a whole barrel, unless it is removed. Similarly, one non-team player can affect the whole effort, unless he/she is changed. Occasionally, it takes the whole team just to change the attitude of one player, but it is an effort worth making.

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# *computers and libraries: the response of library education*


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Computers have had impact on libraries in two major applications:

1. Record keeping, and;
2. Information access.

The first, which may also be referred to as "inventory control," includes all aspects of the application of

computers to the creation, maintenance, and use of bibliographic records within libraries: ordering/acquisitions records, cataloging records, circulation records, and so on.

The second application involves use of computers to improve accessibility and exploitation of information sources through the construction of machine-readable data bases (frequently the equivalent of printed indexing/abstracting services) and the ability to search these sources more effectively and more efficiently than ever before. In the long term, the second application, which has also been referred to as the use of computers in information retrieval or literature searching, is much more important than the first.

In comparison with many other segments of society, the library profession may have been slow to recognize the value of computer technology. Some minor forays into automation did occur as early as the 1950s but these tended to be isolated and noncontinuing experiments. Significant progress was made in the 1960s, especially in the area of information retrieval, but most of the leadership came from outside the library profession per se. Since 1970, however, an epidemic has occurred in the application of computer and telecommunications technologies to library operations. This was made possible by:

1. A rapid growth in machine-readable data bases;
2. The ability to access these data bases through on-line networks;
3. The ability to link libraries together within an on-line network to permit cooperation and sharing of resources;
4. Drastic reduction in the cost of access to computer resources, especially through the emergence of ever smaller computers;
5. The development of a wide range of library-oriented hardware and software that can be purchased off the shelf.

If the profession was late to embrace computer technology, it now seems to be in a mad race to catch up. But perhaps it is running too fast and in the wrong direction. In some places, automation appears almost a goal in and of itself. Special appropriations are made to libraries to implement automated systems, while funds for the support of staff skilled in exploiting information resources on behalf of users may actually be reduced. Meetings of librarians are beginning to sound like meetings of computer programmers. A new cult, with its own mystique, is emerging.

On the whole, the profession has been neither imaginative nor innovative in its exploitation of technology, and some activities may have been automated for the wrong reasons. All too often, convenience of the librarian is given priority over improved service to users.

Circulation systems provide a good example. The major benefit of automating circulation is not saving time in checking books out, or reducing costs of circulation, or even providing more accurate records on who has what. Instead, it should be the improved management information that can be derived from an automated system — patterns of use of various items and categories of items, information that can be used to improve decisions relating to collection development and management and to optimize the allocation of resources. Yet how many systems have been designed with this uppermost in mind, how many libraries collect this type of information or, if collected, how many make productive use of it?

Cataloging provides the best illustration of the simulation approach to computerization. The goal has been more to automate an existing tool than to seek to develop a new and more powerful one. True, the profession has gone from the printing of cards to the implementation of on-line catalogs. But on-line catalogs are usually viewed as card catalogs accessible through terminals. Indeed, some librarians actually speak of automating the card catalog. If card catalogs had never existed, might we now have more powerful electronic tools for access to library resources? Should we not seek to develop new tools, free from existing conventions and traditions, rather than to simulate the tools of the past? The profession operates under too many constraints and fails to question whether the constraints are real or imaginary. For example, since existing cataloging rules were developed for catalogs to be printed in card or book form, are they really relevant within an electronic environment?

Librarians are willing or even eager to accept computers as a kind of cosmetic addition to the existing library structure but most strongly resist any suggestion that they could, and perhaps should, change this structure rather radically or even render it completely redundant. Computers are fine as long as their use is restricted to the manipulation of bibliographic records. But librarians — and many others — reject out of hand the idea that electronics could alter the objects represented by these records, and how these are produced, distributed, and used. The book is and always will be. Electronic access is no substitute for ownership.

In the past twenty years some attempt has been made to modify the curricula of our library schools in response to technological advances and changing

social conditions. These attempts have not been completely successful. The curriculum as it exists in 1985 may adequately prepare students to work in today's libraries. Whether it well prepares them to adapt to the rather rapid changes likely to occur in the next fifteen years is much more doubtful.

A major failure of the curriculum in the past has been its "institutionalization" — an almost exclusive focus on the library as an institution and what occurs within that institution. But libraries operate as one component within an information transfer cycle that embraces the generators of information (authors), the primary distributors (publishers), and the users of information, as well as the secondary distributors (libraries and information services of all kinds). By concentrating on the institution per se, we fail to give students an appreciation of the complex interrelationships existing within the information transfer cycle as a whole.

In 1985 a much less institutionalized perspective is needed. Traditional differences between institutions are beginning to break down and new types of institutions are entering the picture. Publishers can allow direct on-line access to their products or can use television to put them into the home. Publications are issued in an increasing variety of forms, including tape cassettes, video disks and video cassettes, and some are only accessible electronically and cannot be purchased outright. New information intermediaries have emerged and are serving some of the functions previously offered only by libraries. Free-lance librarians are becoming common and new nontraditional roles for information specialists are being recognized. The distinctions between libraries of various types — public, academic, school, industrial — are becoming increasingly artificial as the services they provide become more alike. Most of these changes are the direct result of technological advances.

Library schools have attempted to respond to change by grafting on to the curriculum. Courses have been added in such subjects as library automation and information storage and retrieval in order to accommodate new technologies. The need to apply a more scientific or critical approach to the operation of libraries has led to the introduction of courses in areas such as systems analysis, measurement and evaluation, or operations research. Recognition of the need for a broader perspective on the basic phenomena of human communication and information flow has produced courses in such areas as bibliometrics.

The addition of these subjects of study to the library school curriculum is laudable. Unfortunately, they have been additions for far too long. They have not been integrated; they fail to permeate the curriculum. Not one of these topics should exist as a separate course in 1985. For example, a course on information retrieval may deal largely with the characteristics of information resources in machine-readable form and with the exploitation of these resources, while a second course on reference will deal largely with the characteristics of information resources in printed form and with their exploitation. A valid distinction existed between the two in 1970, when very few libraries made any use of electronic resources and information retrieval was still considered a somewhat esoteric subject of study. The dichotomy is completely artificial today when courses on search strategy, dealing with the exploitation of information sources in whatever form they exist, are needed.

The curriculum of library science should be completely restructured. The appendages must disappear and their contents be integrated within a more coherent curriculum that looks at all aspects of the information transfer cycle — from the production to the consumption of information products. The focus should not be the library as an institution but the information specialist as a facilitator of information transfer within this cycle.

The addition of computer technology to the curriculum has had undesirable consequences. What is happening in the library schools closely parallels what is occurring in libraries. Computers are becoming an end in themselves. Money is available for the purchase of microcomputers and terminals while funds for other things becomes more and more scarce. A dichotomy is occurring between computer librarians and traditional librarians. Some students only want to take courses that have something to do with computers. I have even known doctoral students to use "building a data base" or "putting text into machine-readable form" as their main criterion in the selection of a research project. If this is not a classic example of the tail wagging the dog, I don't know what is.

We are now teaching in library schools what should be taught in departments of computer science or even in high schools. In my opinion, it is not a legitimate function of library schools to teach courses on how computers operate or even how to program them. It is legitimate, and even essential, on the other hand, to deal in a broader way with the effects that computer, telecommunications, and related technologies are having on information transfer in general — their impact on authors, publishers, distributors, and consumers of information products. But this broader perspective is not a separate area of study — it must be integrated within the core of the curriculum.

The computer is a powerful aid to the creation, storage, distribution, and exploitation of information, but it is no more than a valuable tool. The computer per se should not be the subject of study in any but departments of computer science. For a library school to use computer technology as a major focus of study is as wrong as an exclusive focus on the library as an institution. The major resource that the library profession has to offer is a human resource having certain special skills. We obscure this when we focus on the library and we obscure it just as much when we focus on the computer.

In the years to come the need for personnel trained in the collection, organization, and exploitation of information resources — skills long asssociated with the library profession — is likely to increase rather than diminish. The need has been clearly expressed by Horton (1982):

> . . . exploiting the full potential of the Information Age is going to require a basic rethinking of traditional Industrial Age yardsticks — placing the emphasis on creativity, talent, and brainpower. Those are the real "capital assets" of the Information Economy, not information handling machines. Certainly none of this would be possible without the computer and the electronic chip and satellite and other technological breakthroughs. But their distinctive contribution is still in making processes go faster, more efficiently, and reducing the unit cost of information handling. The real payoff is going to come in training and grooming new kinds of Information Age human resources. (Page 39)

Horton refers to the need for "information counsellors." It is these who would presumably be the "librarians" of the future, but it is very doubtful if our library schools are preparing people to become "Information Age human resources." To prepare this type of information professional will require a wholesale reorganization of reorientation of the curriculum. Unfortunately, most of our schools seem oblivious to this need, or choose to ignore it, which is perhaps one of the reasons why several are being closed down, and others are threatened with extinction. The fact is that our curriculum is no longer really "relevant" and our attempts to make it so — by accretion rather than integration — have not been successful. Unhappily, it is difficult to revolutionize a curriculum when the profession at large fails to see the need for any more than costmetic change.

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# *continuing education for automation librarians: current issues and practice*

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Until recent years, focus on continuing education for automation librarians has been peripheral rather than central. This approach has resulted in a gap between what *is* and what *ought to* be taught in the area of information technology. The more susceptible to change the field, the greater the need for implementation of effective continuing education programs designed to eliminate this gap. It follows that the objectives of continuing education programs which help the librarian adjust to highly accelerated change are based on the assessment and fulfillment of the most current educational needs. In accordance with this, the role of continuing education programs designed for automation personnel is to keep the practitioner who is no longer involved in traditional education abreast of the rapid changes and developments in his or her field. Such programs address the following issues: the specifications and applications of the different types of hardware and software packages available, the managerial skills needed to administer the chosen hardware and software, and the staff training required as a result of the newly automated system.

It is the purpose of this article to present the state of

the art of such continuing education programs. To accomplish this, the following issues will be addressed: the administrative guidelines used in the planning of such programs, the area of responsibility for such programs, and the traditional methods used to impart knowledge through such programs. The administrative guidelines addressed fall into three categories: the establishment of objectives, implementation, and evaluation. The institutions responsible for continuing education programming also fall into three categories: professional organizations, libraries, and library schools. The methods addressed are institutes, workshops, internships, and practicums.

The first step in the administrative procedures of a continuing education program is to establish its objectives. Once these have been established, the program can be planned and implemented. If the evaluation of such a program is affirmative, the program, with changes to accommodate any new needs, can be used as a prototype for similar programs in the future. One of the most important objectives of continuing education programs for automation librarians is that of teaching the differences between available hardware and software packages and their potential applications in a given library setting. Purchasing or leasing the appropriate microcomputer typifies the hardware choices today's automation librarian will have to make. Teaching the differences between microcomputers and their applications should, therefore, be the objective of a continuing education program in this field.

Excellent examples of such a program were the Midwest Institute and Microcomputer Fairs held regionally in 1984. These institutes were sponsored by CATALIST (Center for the Application of Technology for the Administration of Library Service and Training), RTSS (Resources and Technical Service Section of the Illinois Library Association) and LATD (Library Automation and Technology Division of the Indiana Library Association). Typical issues addressed were the role of the microcomputer in strengthening library operations and procedures, the OCLC M300 terminal — an enhanced IBM PC microcomputer which has been modified to OCLC specifications, and using microcomputer data base files to replace small paper files throughout the library.[1] Automation and data processing clinics address both similar and related issues. An example of such an Illinois-based clinic was the one sponsored by the Graduate School of Library Science, University of Illinois in 1976. The objective of the clinic was to "acquaint the participants with the economic aspects of specific library applications of computers . . . and to introduce various techniques for evaluating library processes. The clinic seeks to improve the participants' ability to evaluate . . . the economic aspects of alternative systems, to consider a wide range of alternatives, and to organize efficiently the transition from manual to automated systems."[2]

Although CATALIST has been a local Illinois- and Indiana-based operation, it has become more regional. Last year, it sponsored workshops and institutes in eight states. GSLIS clinics have traditionally been nationally-based operations. They are usually offered on a regular basis each year.

Addressing such issues under the auspices of an institute or a clinic is instrumental in keeping the librarian abreast of the latest hardware developments.

Throughout 1984, one of the most frequently discussed microcomputer applications was the on-line catalog, "an automated library system that provides at least the same features as the online catalog and is available to the public."[3]

A conference sponsored by LITA (Library and Information Technology Association of ALA) last year gave an opportunity to address this application and its implications for the future of librarianship.[4] Through such conferences, LITA, like other similar associations, plays an important role in keeping automation librarians educated about the latest developments in their field.

Software education comprises another important objective of continuing education programs. "A software package, whether developed in-house or bought ready-made, should have good documentation, otherwise, no one except its creator will know enough about the program to keep it running or adapt it to changing library conditions."[5] Documentation should, therefore, be emphasized in software training programs. Another facet of software education is teaching actual programming. Although this has been done in intermittent twelve-day clinics sponsored by the University of California at Los Angeles, the value of continuing education programs intended to teach actual programming is disputable.[6] It has been argued that, because of time constraints, learning to program well under the auspices of such clinics is not possible. The librarian should, however, know enough about programming languages to be able to communicate with programmers effectively. This, along with some basics of software coding, can and should be, taught as part of continuing education programs.

The third objective is the learning of skills needed to retrain staff as a result of automating. The need for meeting this objective was typified by the staffs' reaction to a new microcomputer-based system in New York's Geneva Free Library:

> . . . a great deal of the problem had to do with the [negative] staff attitudes toward the micro . . . [GFL's manager] took several steps to turn around these attitudes . . . First, he made the work-station more comfortable . . . Documentation was inadequate, so proper documentation was immediately obtained. [He] . . . made sure all members of the staff had equal use of the micro and did not allow an elite group of micro "experts" to develop. [He] . . . tried to foster the attitude that the staff are in charge of the computer, and not visa versa.[7]

This situation clearly prescribes a training program for personnel newly introduced to a newly automated working environment. An example of such a program, "Training Issues in Changing Technology," was presented in 1984 by LITA and LAMA (Library Administration and Management Association of ALA). The program focused on staff adjustment because of changes in the library environment caused by technological advances. Technology anxiety, implementing organizational change, health considerations of VDT (Video Display Terminal) use, and the importance of viewing automation as a tool for achieving greater productivity were the principal issues discussed.[8]

Continuing education programs intended to resolve staff training and development programs are in demand. Such programs must include training guidelines so that technological innovations plus the regular work load can be absorbed. The objective of such programs should be the ability of all personnel to make workable decisions concerning the automated system which they are to operate.

Evaluation of continuing education programs intended to meet these objectives indicates that such programs, once implemented with reasonable goals in mind, have proven to be quite effective. This conclusion is based on the affirmative feedback from participants and on their increased occupational competence. Programs which fulfill these types of objectives can, therefore, be used as prototypes for future programming.

The next topic addressed is the area of responsibility for continuing education programming: professional associations, employing libraries, and library schools. Library associations have traditionally been particularly active in the area of continuing education, having more or less formalized continuing education programs. Since they operate on a national, state, and local level, library associations attract and represent a large body of constituents. ALA's permissive membership requirements allow all levels of library personnel to belong and be represented by one organization. Because library educators are included in the personnel represented, it has been argued that ALA should, and does, carry a weighty responsibility for continuing education programs. Numerous committees and organizations devoted to continuing education are housed in and funded by ALA. Most notable of these is CLENE (Continuing Library Education Network and Exchange) which is represented in ALA by the means of a round table — CLENERT. CLENE is a network which promotes and coordinates continuing education for libraries by acting as a national, state, and local clearinghouse. It is also instrumental in policy making and evaluation of continuing library education programs.

Libraries and library schools share the responsibility for continuing education. Libraries have been instrumental in providing in-house training for their personnel and they have been very active in organizing workshops, institutes, and conferences. They have also provided access to professional newsletters and other current-awareness literature. Library schools share the responsibility by ensuring that their graduates participate in continuing education programs. Students should learn that the information which is taught in automation courses will quickly become dated and that current knowledge is obtainable through participating in such programs. Alumni, however, argue that library schools have taken the opposite approach to the teaching of automation. The implication of modern library education is that once the diploma has been received, the student's education is over for the duration of his or her career. Occupationally, this is a very harmful approach. It clearly weakens the impetus to participate in future continuing education activity. This has two damaging effects: it increases the previously mentioned gap between what was once taught and actual current practice, and it creates an occupational disadvantage with those who graduate from library school ten years later. This is concurrent with Hiatt's contention that "the years between last formal education and present practice . . . further dramatize the need for librarians to be concerned about their continuing education."[9] Library schools have also sponsored numerous clinics. Excellent examples of this are the two automation and data processing clinics given at the University of Illinois and at UCLA.

One remedial proposal for teaching future librarians that the conferred degree does not educate them permanently was presented by J.L. Divilbiss in his article "Problems of Teaching Library Automation." The article proposes the specification of the content of library courses in accordance with topics which do not

become obsolete. Rather, by their changeable nature, their content has to be updated and relearned with the passage of time. This can be attained by dividing the content of library automation courses into three goals: familiarizing the student with the uses of computers in libraries, teaching the student to read and understand a large body of automation literature, and teaching the student to communicate technical requirements to programmers, system analysts, and other nonlibrarians. Typical issues that a student should understand are autonomy versus cooperation, turn-key systems versus independent development, and the establishment of standards.[10]

The automation student should become familiar with such periodicals as *Datamation*, *Information Technology and Libraries*, and *Journal of the American Society for Information Science*.

To be truly effective in the area of continuing education programming, professional associations, libraries, and library schools should work together rather than as independent units. This has too rarely been the case.

The final section will address the methods traditionally used to impart knowledge through continuing education programs: institutes, workshops, conferences, internships, and practicums.

Institutes and workshops, "short instructional programs set up for special groups interested in some specialized type of activity,"[11] are high in vocational training and low in theory. They are especially needed in areas where library training emphasizes theory rather than practice. The CATALIST microcomputer fair is an excellent example of an institute. Typical workshops are the ones sponsored by the IOUG/CETF (Illinois OCLC Users' Group Continuing Education Task Force) which are intended to teach library practitioners about various uses of OCLC. "[They] are designed as training sessions for practicing library personnel, current staff of libraries new to OCLC, and staff seeking to learn about enhancements to the OCLC subsystems."[12] Following the workshop and/or institute, each participant has the responsibility to provide in-house training for his or her own staff.

Conferences, typically, take the form exemplified by LITA. They are composed of lectures and talks which permit sharing of new information on library automation issues. Subsequent sessions allow discussion by individuals, small groups, or appointed committees. They also commonly feature exhibits permitting hands-on experience of new systems and machines. Information containing the content of such conferences is circulated through newsletters and other current-awareness literature.

Practicums and internships are recommended by all sectors of librarianship. Although not in the same genre as the short, traditional continuing education programs, they permit the lengthy, recurrent confrontation of problems which are rarely mentioned in the course of these programs. These types of problems are often superficially addressed or completely omitted from traditional library school curricula as well.

This article provides an overview of the status of continuing education programs for automation librarians today. To be effective, these programs must be established in accordance with certain objectives. These objectives are to teach the differences between available hardware and software packages, the potential applications of such packages, and the skills needed to retrain staff as a result of the newly automated system. Evaluation of continuing education programs implemented with such objectives in mind has indicated a high success rate. What the strategy based on objectives, implementation, and evaluation suggests is that such programs should be used as prototypes for similar programs in the future. Four categories represent the form which continuing education programs typically take: institutes, workshops, internships, and practicums. Clinics and conferences have also proven to be quite effective. By providing broad representation, and formalizing continuing education, professional organizations, employing libraries and library schools have shared the primary responsibility for continuing education programs. They have also been instrumental in updating practice through supplementing preservice curricula, in-house training, current-awareness literature, and teaching students that the knowledge represented by their degree will eventually become obsolete.

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# oclc and the continuing education program in illinois

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The Illinois State Library and the Illinois OCLC Users' Group have a cooperative relationship which promotes education and training activities for Illinois OCLC users. The Illinois OCLC Users' Group (IOUG), a not-for-profit organization was established in 1975 to promote the use of computer data banks and related materials for libraries and educational institutions for literary, educational, scientific, and research purposes.

OCLC service in Illinois began first as a project proposal on behalf of the four Research and Reference Centers in Illinois. The four libraries — Chicago Public Library, University of Illinois at Urbana-Champaign, the Illinois State Library, and Southern Illinois University at Carbondale — have processed their materials via OCLC since the fall of 1974. Because of the success of this project public academic institutions were invited to participate in the program. They were soon joined by twenty-seven private colleges. The rapid addition of these academic institutions with differing requirements created the need for an organized training program. The purpose of that program was to train library personnel in the use of the data base as proficiently and efficiently as possible.

ILLINET, is operated by the Illinois State Library. Its organizational structure has done much to encourage cooperation between the Illinois State Library and the IOUG.

The major program activity of the IOUG is a series of workshops sponsored jointly with the Illinois State Library. A primary goal of this program is to provide something for every OCLC user during the program year which traditionally corresponds to the academic year. Sessions are provided for instruction in beginning and intermediate level format work in addition to "Current Topics" sessions and an annual update session for OCLC administrators. The intent of the State Library and the IOUG is that workshop sessions reflect, respond to, and meet the needs of users in Illinois. The sessions provide ongoing, specialized, and comprehensive training for those who are experienced library personnel as well as an incremental training experience for those new to the OCLC system.

The Illinois OCLC User's Group holds an annual meeting in conjunction with the Current Topics or the OCLC Administrators meeting. The officers of the group are elected at this meeting and they establish and implement operating policies for the group. Librarians who have assumed leadership roles in this organization are of excellent caliber. Many of the current members have maintained an interest in the organization since its inception.

As modifications and enhancements are made to the system, the State Library staff and the IOUG act together to bring the information quickly to the users in the form of training and instructional programs. Formal activity began in 1975 with five workshops being offered in cataloging and serials. Each year since that time the number of both workshops and participants has increased. Sessions in all cataloging formats are now offered as well as instruction in the LC Name-Authority File, Serials, Acquisitions, and Interlibrary Loan. In the fall of 1984, when the Archives and Machine-Readable Data File Formats became available, the MRDF format was presented in three workshops, which were well attended. Illinois users were given the option of attending the Archives Format Training session in St. Louis. Both of these formats will now be added to the regular training schedule during the 1985/86 year.

The success of the education and training program has been due in a great part to the efforts each year of the Continuing Education Task Force. This group is appointed by the executive board of the IOUG and serves for a two-year term. The task force works closely with the State Library staff to ensure smooth operation of the training program. Traditionally the chair of the task force serves as the registrar for all workshop sessions. The task can only be fully appreciated by those who have actually done it for a one- or two-year period, but it is obvious to all that the work

load is enormous. This person plays a pivotal role in the entire OCLC program of continuing education in Illinois.

The task force meets several times each year to discuss the program, plan for new offerings, and evaluate what has been done. The contributions of those who serve on this committee are extraordinary in both quality and quantity. In the last three-year-period accomplishments of this group have included the redesign of the program booklet and the entire course structure, together with the addition and deletion of courses.

As OCLC changes, the training program must change. The task force each year dedicates itself to making sure all course content is current and relevant. Workshop evaluations are reviewed and play an important role in determination of the programming for the next year. The current task force is planning a review of the present evaluation with plans for a new one to be used during the 1985/86 year.

A mentoring program has been under consideration by the past two task force groups. The executive board of the Illinois OCLC Users' Group and the Continuing Education Task Force are planning to implement the program during the current session. The intent of this program is to assist interested libraries in making management decisions concerning the impact of OCLC on internal operating procedures. Once on-line the mentor would continue to offer a minimum level of free assistance. This program is not intended to replace the institutions' contact with the network staff at the State Library but to serve as an enhancement to that relationship. Its goal is to establish, on a voluntary basis, one-to-one relationships between new and experienced OCLC members whereby a new member can obtain at little or no cost, technical assistance in designing new procedures or policies necessitated by the introduction of OCLC services.

Any OCLC library may apply for designation as a "mentor library." Application is made to the Continuing Education Task Force of the Illinois OCLC Users' Group, which selects mentors with the approval of the ILLINET/OCLC office. Everyone involved in the formulation and development of this program realizes that this type of assistance has been informally occurring for many years. The purpose of this program is to formalize the process by improving it and making it more readily available to any new OCLC user in the state. Many of the libraries currently coming on-line are special libraries. The staffs in many libraries are small, often fewer than five employees. The mentoring program will provide a helpful service to those new institutions from a similar type organization.

A continuing education forum on May 8, 1984, was the first held and coordinated by the Continuing Education Task Force, the Illinois OCLC Users' Group, and the Illinois State Library. Anyone who had served as a leader for a training session during the previous three years was asked to attend the half-day forum. This forum provided participants with an opportunity to discuss the general issue of training and to review specific materials provided by OCLC for use in training sessions. The description of courses published in the program booklet and special needs and expectations of the workshops as identified by the trainers were also reviewed. The forum received positive feedback and will be repeated every year for the benefit of those involved in the continuing education program.

The contributions of these volunteers ensure the success of individual programs. The IOUG reimburses all leaders for travel and meal expenses, and the State Library offers support, including technical assistance, such as duplication or provision of materials. The primary contribution, however, is the effort of the workshop leader. Indeed workshop leaders are the foundation upon which the program is built. This type effort is just beginning in some of the other networks, but it has been developed in Illinois from the beginning. The Continuing Education Task Force and the State Library staff continue to seek involvement from more OCLC users either by becoming workshop leaders or offering use of a meeting room. Volunteerism and participation by libraries contributes to more diverse programming and widens the circle of expertise.

The Illinois State Library does maintain a file of appropriate materials for the courses but the leader's experience usually provides a more than ample supply of examples and situations from which to build a training session. However, past task forces as well as the current one have attempted to standardize and improve the files of resource materials housed at the State Library. OCLC has prepared materials for all first level training sessions in the cataloging formats. Working with the prepared packets, in addition to materials prepared by Illinois instructors, the task force hopes to prepare a comprehensive file of materials which would greatly reduce the amount of time an individual instructor must spend on preparation for each workshop session. Current emphasis is being placed on training materials for first level monographs and serials. This project will standardize materials and course outlines and improve the quality of the workshops.

A little discussed but vital aspect of the program is the generosity of many Illinois institutions in providing meeting rooms for the workshops. Convenient park-

ing, refreshments, and easy access to restaurants are all vital to the success of a workshop session. No Illinois institution has refused to host a workshop or denied the use of their own OCLC terminals if hands-on training is needed.

The contact people at the institutions do much more than we can acknowledge to make the day successful. Roosevelt University, for example, is always the site for the initial training session. They have dedicated terminals as well as dial-up capability. The library staff ensures that meeting rooms are ready, AV equipment delivered, and that coffee and rolls are there when people arrive. It is this type of meticulous attention to detail by all levels of personnel which guarantees the success of workshops.

In summation, the OCLC Continuing Education Program in Illinois has a rich history of interest and participation by all Illinois users. The contributions of all participants in this continuing education program have made it a success and a model for other states to emulate.

The past is merely prologue and will serve as a firm foundation for future development.

# *implementation of the innovacq acquisition system*

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Libraries have benefited from, and in a few instances have been victims of the development of computer technology. Since the dawn of the computer age, over thirty years ago, libraries have participated in this development. It has only been in the last ten-twelve years, however, that computer-based technology has been readily available to, and used to any great extent by more than a relative handful of libraries.

The first stage of widespread utilization of the technology started with the creation, in the late sixties and early seventies, of data bases that were to become either national or regional in scope, such as OCLC or the Washington Library Network. We also saw the development of institution-based operations such as LCS at Ohio State and other local data bases, most often found in city or regional public library networks. Virtually all of these operations were designed in such a way that a minimum of computer storage capacity would be required. This limitation resulted in few access points, utilization of which required prior knowledge of search keys or other access information.

The last few years, however, have seen the development of what could be called the second stage of computer-based technology as applied to libraries. This stage is distinctive in its reliance on microcomputer concepts; with their "stand-alone" capabilities, and most importantly, their "user-friendly" displays. The "user-friendly" program for the LCS system is a good example of second-stage utilization. The Innovacq Acquisition System, designed and marketed by Innovative Interfaces, Inc., also meets all of these distinctions.

The Innovacq System, while found in scattered locations in both the United States and Canada, was new to Illinois when Milner Library accepted its installation. A brief review of it's characteristics is therefore appropriate. The configuration we purchased is, like all Innovacq systems, based in a mini-computer with multiple processors. The system hardware currently installed consists of the mini-computer and a "Winchester" disk storage unit, three terminals, one dot-matrix printer, an interface with an OCLC printer port, and a telephone modem. We provide one telephone line essentially for software maintenance which, while not dedicated, is de facto restricted to Innovacq.

The system hardware, which was configured to meet our specific requirements, utilizes menu-driven screens to provide access to the two operating subsystems, Data Retrieval and Ordering and Receipt, and one File Maintenance subsystem. These three

components provide full support, including fund accounting and purchase order creation, for all monographic book acquisitions. The system also provides full support for our approval plan. While not menu-driven, we also have available from a designated OCLC terminal an interface that allows the down-loading of specific fields from an OCLC record, a verification for duplication, and the creation of an order record. This subsystem is used primarily for the creation of approval receipt records.

Milner Library had for several years prior to the Innovacq purchase been investigating automated acquisitions systems. We had seriously considered the development of an in-house system based on the university's mainframe computer, but such plans never moved beyond the preliminary stages. We also considered systems offered by various library vendors but were concerned about communications charges. The development of local systems based on mini-computer concepts were promising, and proved to be the key. The Innovacq system was first observed at the American Library Association convention in the summer of 1983. Two of us later were able to visit a Midwestern Innovacq installation. While we continued to study all available systems, by December 1983 we were convinced that the Innovacq was the best for us.

The basis for this decision was multi-faceted. The OCLC interface was important, because it gave us access to a nationally based, locally accepted data base which while not the most current in respect to recent publications was sufficiently up-to-date for our requirements. This interface was also important because it allowed the creation of order records which in most instances would perfectly match the eventual cataloging entry. These records would also be accurate — assuming the OCLC record was accurate — and would transfer without the need for keying the basic bibliographical information. The "stand-alone" concept freed us from not only communications charges, except for the reserved telephone line, but also guaranteed independent reliability. A problem elsewhere would not impact on our operations. The potential for Innovacq as expressed to us by the developers, and as confirmed by previous purchasers, appeared high. Innovative Interfaces would be dedicated to providing full after-installation support. A required maintenance contract would theoretically insure this, but the assurances of others confirmed it. Enhancements on the basic system had been released. These enhancements, included in the maintenance contract, indicated a long-term dedication to the system and its purchasers.

We were impressed by Innovacq's serials check-in subsystem. While not purchased initially, we did consider the potential for adding this subsystem in our deliberations. The check-in system would provide full support for all continuing orders; subscriptions, standing orders, and certain blanket orders. This support would include not only basic check-in (Kardex) information but also the full financial support as provided for monographs, with additional enhancements necessary to support a complete serial system.

We were also intrigued by the public service potential for the Boolean search capabilities of Innovacq. This would permit the preparation of lists of bibliographic records based on any of the fixed-length fields in the record. We considered this capability as a fringe benefit; it has become virtually an essential component, used often times daily for the production of special lists for use both within technical services and also in public services.

The most important aspects of Innovacq were the basic order and accounting programs. These procedures, while found in other competing systems, were well planned and executed in this system. We were especially impressed with the accounting system, not only fund accounting but also the checks and balances that the system had included. We felt it would stand the examination of any auditor.

The purchase order for the Innovacq Acquisition System was placed in December 1983 after review by numerous university departments and our governing agency, and we were assigned an installation date of late April 1984. It was at this point that education for implementation of this new technology began in earnest.

We had, however, since the previous summer been involved in study and education regarding microcomputer-based acquisitions systems. Literature searches had been made, visits scheduled, friends queried; all in our attempt to learn as much about this and other systems as possible. One of the most important steps that we took was to request an on-site demonstration of the Innovacq system. We were in a situation where there could be considerable staff anxiety regarding the proposed changes. We not only encouraged full staff involvement in the presentation, but also preceded the visit with staff discussions and the routing of written descriptions.

The establishment of our installation date should have been the trigger for extensive study and training, but this was not to be the case. We requested, but were not able to obtain an Innovacq user's manual. The reason provided for the unavailability of a manual was that the version then in use had become inaccurate as a result of several software enhancements.

Innovative Interfaces preferred to give us nothing rather than a manual with known discrepancies.

We were able to commence preliminary work on the financial reporting portion of the system. In order for Innovative Interfaces to properly prepare our initial fund reports we provided them with copies of our existing financial reports; these served as the basis for our on-line fund reports.

We also received a listing of options and suggested codes for the fixed length fields. Based on information in hand and our nonautomated procedures, we were able to make a number of basic decisions. As important, we became familiar with these codes and their purpose. We were unable, however, to undergo any type of formal education; only continued exposure to the literature regarding the system. Based on that literature we prepared, mainly for clarification purposes, several flow charts, position responsibilities, and other preliminary documents. While not necessarily utilized or adopted they were of value to both the creator and the recipients in detailing certain operations, particularly those that eventually required procedural changes.

The actual installation was preceded by a division-wide meeting. We were able to discuss not only the installation plan, including equipment location, but also a preliminary training schedule which had been created based on suggestions received from Innovative Interfaces.

The Innovacq manual was hand delivered on the first day of installation. We relied totally, however, on the installer-trainer provided by Innovative Interfaces for basic orientation. She utilized the previously prepared schedule and worked individually or in small groups explaining through exposure and example the basic subsystems. She asked the involved individuals to gather and with each working in turn explained the various operations and options. Although we did have several snags during the installation we covered all basic components of the system.

The most important training actually was accomplished in the weeks immediately following installation. A group of five supervisors or assigned employees served as the training cadre. All studied the appropriate sections of the manual and, as necessary, prepared written guidelines. The menu-driven format was conducive to self-training; several individuals worked alone and learned their aspects of the system through simple exposure and access to the manual. Others required more formal training sessions. Student employees were exposed one-on-one and, as with the staff, some essentially learned the appropriate operation alone while others were trained step-by-step. Because of the flexibility of the system we were able to tailor the instruction to the complexity of the material or program and the requirements of the individual receiving the training.

We were also concerned with nonacquisitions use of the system. We made appropriate general user-manual pages available immediately and within a few weeks of installation were able to release an extensive guideline to the system's searching capabilities. Later we prepared a guide to the system's Boolean search capabilities. Several staff members had expressed an interest in the latter feature, particularly for new book lists. While this program will require extensive training, it is an aspect of the Innovacq that can be learned and utilized by public service personnel.

In retrospect, the implementation orientation, while handled efficiently by the trainer, would have been more productive had we earlier been able to provide a basic "book orientation" to all operators. We did, even without this preliminary stage, succeed in our goal of introducing the system's basic components to all who were required to use it. The lack of detailed information on the system prior to installation, particularly on specific operating procedures, resulted in the discovery, during the orientation, of discrepancies between our existing procedures and system-dictated procedures that required rapid decisions. Many of these decisions were required while the representative and staff operators were in the middle of a training session. Given the haste with which changes were made it is surprising that the number of decisions requiring later modification was not greater. Given the problems we had at the time the informal, self-trained, one-on-one, or group sessions proved to be an excellent method for training. Each operator essentially learned through the method best suited to his own preference. One of the five leaders was always available for assistance and clarification or for contact with the Innovative Interfaces office if required.

If we were to repeat the operation I would insist on more complete information being provided prior to installation. Given the circumstances, it would have made the basic training and orientation more relaxed and less stressful for all. We did, however, accomplish the basic goal of acquainting all concerned with the system. By utilization of a relaxed, unstructured system of training we were able to reduce, if not eliminate, the anxiety caused by the lack of information prior to installation. Given the menu-driven concept of Innovacq and the enthusiasm by which the individuals who were to become the operators accepted the informal training methods, we overcame the handicap of incomplete documentation prior to installation. The implementation of new technology will not always be

as smooth as managers would like, but given the willingness of staff to learn, and trainers to be flexible in their methods, virtually any problem can be overcome.

# *staffing technical services: expectations vs. realities*

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If the process of staffing technical services was a relatively trouble free one, there would be no point in writing an article about it. Unfortunately, library managers find a number of substantial headaches associated with staffing in technical services and, consequently, the resulting problems present a variety of material for the writer. This article will be too short to attempt any solutions, but describing some of the troubles as candidly and as openly as possible may suggest some new avenues of approach to problems we have either neglected to address altogether or have, for one reason or another, failed to recognize at all. My comments are based on some twenty-three years of academic library experience, most of it in administration, and over half in technical services. My opinions are biased and tend to be laced with generalizations. Whether or not you agree with my point of view or share my beliefs, I think you will admit that we have substantial problems that need to be addressed and that past attempts at finding solutions are probably not the ones we ought to consider using as we face our 1985 dilemmas.

### We've Come a Long Way in Twenty Years

Not so long ago, our library schools were graduating generalists who had been given a wide range of library skills and turned loose as all-purpose librarians qualified to handle almost any kind of library position. That was in the late 1950s and early 1960s when there were reportedly thousands of unfilled vacancies in the library job market. Louis Shores, the eminent historian, educator, and Dean of the School of Library and Information Studies at Florida State University, was telling graduates of the period (and anyone else who would listen) that there were one hundred thousand jobs available for qualified librarians. He may have been off the mark by ninety thousand or so, but there is no denying that during that period library jobs were plentiful and it was possible for a beginning librarian to get a job by mail without ever having had a formal interview. A good cataloger was just as hard to identify and hire then as now, and those librarians who "liked dealing with the public" found plenty of openings in reference and public services. There were no equal opportunity employers and affirmative action had yet to be invented. Librarians were being hired right out of library school for directorships. Massive doses of punched cards fed into giant, mainframe computers were going to resolve the information explosion. Those were also the days when the technological aspects of technical services still revolved around the typewriter. Cards were ordered from the Library of Congress or duplicated from proof slips (which were filed by the thousands). Original cataloging was still the greatest library mystery of all time and cataloging backlogs were the rule rather than the exception. Serials check-in was one of the major labor-intensive technical services activities requiring thousands of hours of student and clerical time to be devoted not only to checking in periodicals, but also to claiming and processing. The fourteen-part, 3" × 5" multiple order form was the norm in acquisitions where order verification chewed up countless hours at the *CBI, Books in Print, PTLA,* and the card catalog. Approval plans were not yet on the horizon and the nearly extinct gifts and exchange librarian of today played a significant role in the library organization.

Turnover among librarians was relatively high because jobs were plentiful. Mobility was the name of the game. Joining the Navy wasn't the only way to see the world. You could also become a librarian. That was the library scene not so long ago. Because of the demand for library skills and the short supply of quali-

fied applicants, lots of poorly qualified librarians were drafted into service. Many of them performed poorly as beginning librarians and are today turning in the same poor performance records as administrators. Acquisitions librarians who had difficulty balancing their checkbooks were spending hundred-thousand-dollar budgets.

**The Generic Cataloger**

Catalogers as a group have had a field day when it comes to calling the shots in technical services. Because their work is highly detailed and requires considerable knowledge about vast quantities of specialized information which must be interpreted and reinterpreted, they have a tendency to drive the technical services operation. They can, and frequently do, control the flow of materials from acquisitions to the stacks. If the catalogers and their leader are performance oriented and dedicated to getting out the work, materials flow uninterrupted. But, if they are tradition-bound and geared to a particular pace, come what may, the backlogs pile up and whether or not you have OCLC, as well as a flock of in-house automation aids, moving those materials past cataloging will simply not proceed any faster than the agreed rate. Staffing is critical in cataloging, and yet we seem unwilling to make the attempt to people the cataloging units with staff who are producers first and perfectionists second. In many instances we find ourselves with 1960 vintage catalogers attempting to apply outdated concepts to 1985 technology. Perhaps, if we could tolerate a higher error rate in cataloging in exchange for a substantial increase in production we might attract some risk-taking librarians who would be willing to become catalogers. Ask a librarian who isn't a cataloger if he or she would like to become one and see what kind of response you get. It is not seen as a particularly interesting or attractive occupation, partly because catalogers have conspired to make it that way by doing everything possible to load it with complicated routines and procedures that are vital to their notion of the cataloging process. Are there catalogers out there who are less traditional and more production oriented? A few, but they are outnumbered and very difficult to identify. To make any substantive changes in the way we do our cataloging will require new attitudes on the part of the practitioners and a great deal of determination to break new ground and a willingness to effect change on the part of technical services managers. More about them later.

**Yesterday's Bookmen**

How about acquisitions? Not so long ago the acquisitions librarian in academic libraries was typified by the "bookman" who knew the literature and could spot a rare book at a thousand yards. The bookman had trouble getting the work out when it came to serving as a purchasing arm of the library, however. Handling budgets and disbursing funds properly was another of the bookman's problems. Searching the card catalog, plowing through old volumes of CBI and reviewing dealers' out-of-print catalogs were where the bookman excelled. In all fairness, it should be pointed out here that the bookman image is not restricted to the male gender. Does acquisitions have anything to do with purchasing? Of course it does. At the risk of oversimplification, acquisitions librarians are book buyers. The good ones deal with the sources that can deliver quickly at the lowest possible price. The good ones are fiscally responsible and accountable. Just because they work in a library is no reason not to run their operations like the most efficient and effective of purchasing agents. Modern acquisitions librarians have to be able to write and administer contracts, deal effectively with a variety of vendors and keep track of their funding. They must be cost conscious managers who are constantly looking for new ways to reduce the cost of doing business while making every effort to improve service. Unfortunately, library schools don't train librarians to become acquisitions managers. The really good ones learn the ropes from on the job experience. They are almost as hard to find as innovative catalogers, but the top performers among them are certainly more visible than the catalogers and can be recruited. Does the acquisitions manager need a library degree if purchasing skills are so important? Probably not if the candidate is well qualified in purchasing and accounting and is willing to learn library terminology. He or she might not be able to spot that rare book at a thousand yards, but the purchasing and accounting skills will more than make up for this minor deficiency.

**The View from the Kardex**

Serials is a sensitive area these days. Some years ago librarians got the notion that serials constituted such a complex area of librarianship that there ought to be experts trained to deal with it. Enter the serials librarian who ordered serials, checked them in, handled claims, and may even have done the cataloging. The serials librarian operated the binding process as well. Today that scenario is changing and we find the acquisitions librarian ordering serials using an automated system which also handles check-in and all the other tedious, labor-intensive chores associated with the serials process. The bindery contract can also be handled effectively by acquisitions. Catalogers can

and do catalog serials without the aid of a serials librarian. Our staffing worries may be nearing an end when it comes to this particular category of librarianship in all but some of the largest libraries.

Gifts and exchange librarians are few and far between these days, having gone the way of what I just predicted for the serials librarian. This former professional position can easily be handled by a clerical position in acquisitions if indeed it is needed at all.

**Managing vs. Administration**

Now for the technical services manager. I've used the term "manager" and revealed another one of my biases. A manager in the sense of a business manager who possesses the skills to deal effectively with people and money in accomplishing the mission of the library. The real manager is the library mechanic who is the doer of all deeds who has one eye on the goal and the other on the means of accomplishing it. The administrator maintains the bureaucracy and is rarely the kind of person who can be called upon to move even small mountains. The successful technical services manager runs a "lean and mean" operation with a very few highly skilled librarians managing an equally well trained clerical staff all geared to providing the highest level of technical support at the lowest possible cost. There are few true managers in libraries because our traditional library organization is too rigid and inflexible to accommodate them. We like what they can produce, but we are not willing to accept the change they require in order to provide the benefits.

**Attacking the Status Quo**

It appears that there are still a number of library jobs traditionally occupied by librarians, jobs which could be done equally well by paraprofessionals, clericals, or even students. It is also clear that as a profession we don't always use our talented individuals to best advantage when it comes to training and teaching. Rarely do we attempt to train managers either on the job or in our graduate library schools. We don't set performance goals nor do we require our professionals to produce according to a predetermined charge. Worst of all we aren't able, even if we are willing, to reward adequately the few top performers. Either the dollars are not there or we are afraid to risk offending the nonperformers who feel they should have a piece of the pie as a reward for showing up for work on a regular basis. Most of us still have fat in our organizations, both public and technical services alike. We've never really gotten down to taking a hard look at what it is we absolutely can't do without in order to keep the organizational wheels turning. After all the budget cuts we've sustained in recent years, many of us still have opportunities to improve work flow and overall efficiency. It takes an innovative approach and it requires a willingness to take a few risks, but the rewards are there for those willing to make the effort.

**The Way Out**

If there is any clue how to go about extricating ourselves from the variety of technical services dilemmas we face, the majority of which are people problems, it will be found in the area of leadership. If the leader is concerned with improving the quality of staff and can back up that concern with action, the encouragement and motivation that action generates can start the process. Instead of hiring people who "won't rock the boat" or who don't pose a threat to the existing organization, the search committees need to look for leaders, risk takers, people with a proven record of achievement. Those new professionals in turn can inspire the present staff to set performance standards, can teach new skills, and can manage effectively. A committed, motivated, and talented staff can face budget problems, organizational red tape, backlogs, and bureaucracy and win.

Technical services is a labor-intensive business today in spite of automation. We spend hundreds of thousands of dollars annually designing systems. We agonize over equipment and software purchases and almost every other technical aspect of what we do, but we consistently neglect our most important resource, people.

Unless we get serious about the quality and quantity of staffing in technical services, somebody else will be able to write this same article twenty years from now, by simply changing the dates. A few seminars, workshops, and similar quick fix approaches won't help our staffing problems. Only when we begin to allocate specific resources for retraining and upgrading librarians to cope with 1985 library management needs, are we going to begin to resolve some of our problems. Only when we tighten our recruiting requirements and demand quality will we begin to create the kind of organizations which can deal realistically and effectively with the important issues and complex decisions that have to be made by technical services from the managers on down. We can't afford to continue to have big league budget and management decisions made by the people who have trouble balancing a check book.

There you have it. Biased, opinionated, one sweep-

ing generalization after another and narry a footnote to properly sanctify any of it. There are no statistical surveys, or even opinion polls to offer support, yet I think we all see a certain element of truth running through it. The question is, if we have neglected staffing needs so long, is there anything we can do about bringing about any improvement? There is, but first we have to agree as a profession that there is a problem. If we can agree on that, the solutions are there to be borrowed from others who have faced the same organizational dilemmas in countless other professions.

# *education for the technical services manager*

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Management in the technical services area of any library today is set in a scene of constant, although not always foreseen and planned, change. Such change is brought, at least in part, by continuing automation of the separate traditional technical services functions — acquisitions, serials, and cataloging — which has altered the responsibilities of professional and clerical staff, and has also brought into question the separation of library services into public and technical areas. Gorman[1] and Peele[2] have both examined this separation and suggested that library organization itself may be shifting to create new configurations which do not discriminate between two different branches of service. While this thesis may not be revolutionary to the professional employed in a library too small to have enjoyed such distinction of duties, the suggestion of merging duties often brings defensive objections from either or both divisions. The reference librarian may readily accept backup help from a technical services librarian, but may recoil from the idea of reciprocating with a stint in cataloging or serials. The reason may be as Bachus[3] says that "there exists in many libraries the implied concept of first and second class professional positions: readers services in the former and technical services in the latter." Even if such class levels are not perceived, the fact remains that automation has reduced professional involvement in the technical services areas, at the same time increasing the need for greater professional expertise in user service to help the patron cope with more sources of information and better ways to access it.

Education for the technical services manager therefore is not a simple list of courses in classification and cataloging or an all encompassing technical services functions, nor does it consist of a few extra courses from the school of business. Instead, the potential technical services manager must acquire a broad preparation while in graduate library school, blending courses from related disciplines into the library course offerings, and then follow that preparation with continuing education workshops and seminars throughout his/her career. As a basis for this formal study, the ideal technical services manager for any type of library also possesses the abilities Battin[4] desires for her university and research library professional: "problem-solving skills, a high degree of flexibility, and ease with ambiguity, managerial and supervisory skills, and the capacity to operate continuously and creatively within a web of tension." The formal course work in the graduate library school does constitute the first step in the process, however, since as Rohdy[5] points out "many technical services librarians are middle managers or first-line supervisors who may have begun their careers without administrative responsibilities, then moved into management positions for which they qualified on the basis of expertise in some aspect of technical services." That expertise naturally is sharpened by on the job practical experience but library school education provides the framework with a conceptual overview and theoretical analysis of library service and all its components.

The four graduate library science programs in Illinois accredited by the American Library Association attempt to provide such a framework through a combination of introductory required courses and electives which focus on a functional type of library or subject area. The number of courses for the master's degree is basically the same at all four institutions, but only the University of Chicago requires that a student complete a master's project (either thesis or paper) before the

degree is granted. A comparison of required introductory courses shows a smattering of social and access courses at all four schools.

Rosary's program adheres closest to the traditional approach with six proscribed courses (eighteen hours) from the total requirement of thirty semester hours. Those six courses (Reference and Bibliography, Selection and Acquisition of Material, Cataloging and Classification, Administration, and two courses from a three-part series of Reference Sources in the Humanities, Social Sciences, and Sciences) are solid building blocks but they do not leave a lot of space for courses which reflect the changes which have affected the field of librarianship in the past several years, nor do they necessarily provide a contemporary foundation for the future technical services manager.

The other three library science programs, at Northern Illinois University, University of Chicago, and University of Illinois at Urbana-Champaign, show attempts to make course offerings relevant to the changing information world, or at least to allow students more opportunity for a broader preparation. Northern's nine to eleven required semester hours (from the total of thirty for the degree) have to be preceded by undergraduate courses not applicable to the graduate degree: Organization of Library Materials, Selection of Library Materials, and Basic Reference. The four required graduate courses are a basic orientation pointed to in-depth research at the end of study: Foundations of Librarianship (three hours), Library Organization and Management (three hours), Research Methods in Librarianship I (two hours), and Research Methods in Librarianship II (one-three hours).

The program at the University of Illinois demands only two required units (from a total of ten for the degree) for basic introductory material otherwise aimed at the advanced undergraduate: Foundations of Library and Information Science (one unit), Introduction to Services Relating to Organization of Library Materials (one-half unit), and Introduction to Information Sources and Services (one-half unit).

The seven required courses (from the total of fifteen) specified in the University of Chicago program cover fundamental skills in four areas: Area 1 — Access to Library and Information Resources (Bibliographic Control of Library Materials, Resources for Reference and Information Services); Area 2 — Tools and Techniques (Computer Programming, Basic Mathematics for Information Science, Empirical Research Methods); Area 3 — Major types of Libraries (one course required from four offered on types of libraries); and Area 4 — Libraries, Information, and Society (one course from five offered in relation to library history, publishing, and libraries and society).

Beyond the introductory level courses at any of the four accredited library schools in Illinois, the student interested in technical services management should select courses whose descriptions are synchronized with the ongoing changes in libraries and technical services functions. The catalogs of all four institutions promise such courses:

Northern Illinois
- Program Evaluation for Libraries
- Library Networking and Cooperation
- Information Storage and Retrieval

Rosary College
- Data Base Management
- Information Systems Analysis
- Computer Application in Libraries
- Microcomputer Application in Libraries
- Information Storage and Retrieval

University of Chicago
- Automation of Bibliographical Control in Libraries
- Introduction to Computers
- Financial Management for Libraries and Information Services
- Managerial Information Systems Analysis
- Decision-making Techniques for Librarians
- Information, Storage and Searching
- Bibliometric Distributions

University of Illinois
- Library Automation
- Techniques for Managerial Decision-making in Library and Information Science
- Information Storage and Retrieval
- Measurement and Evaluation of Library Services
- Management of Libraries and Information

Courses on planning and design of a library building, preservation/conservation of library materials and government documents may not seem immediately relevant to technical services, but some knowledge of these areas is essential as managerial duties are assumed.

All four Illinois graduate library schools give full treatment to the cataloging function, but other areas of technical services and the interrelationship among them, are usually lumped together in one overview course, although Rosary's Technical Sciences On-line treats the integration of functions in on-line systems. The University of Illinois labels the overview Technical Services Functions, and Northern calls it Technical Systems and Services. Rosary College is the only school to set serials apart with Serials: Problems and Techniques. All four institutions virtually ignore acquisitions and circulation, while cataloging/classification is alive and apparently flourishing, at least if one judges from number of courses offered beyond the introductory level (Chicago-two, Rosary-two, Illinois-two, Northern-one).

All four library schools encourage students to take courses in other parts of the institution, and Rosary and the University of Chicago suggest courses of study leading to joint degrees in another subject besides library science. The future technical services manager should be especially interested in the MBA/MALS joint degree programs because of the opportunity to study management and financial areas. The technical series manager can benefit especially from business courses which teach the basic principles of management and administration since they are essential to the library environment. The program at the University of Chicago suggests management courses in accounting, microeconomics, and personnel management including unions and collective bargaining. Public administration is a field which also is immediately applicable for libraries, as are most courses which deal with human resources, including those offered by schools of education or of psychology. The University of Chicago proposes a series of courses from various disciplines, all of which deal with the nature of formal organizations and human behavior, whether individual or in groups, within those organizations. The Certificate of Advanced Study programs at Rosary, Illinois, and Chicago provide another opportunity for the practicing librarian to upgrade current skills, but Rosary's Certificate in Special Studies in Technical Services offers such basic technical services knowledge that it may be more appropriate for a librarian returning to the work force than to its avowed audience of "those who wish to specialize in the operation of and planning for technical services . . . and assume more administrative responsibility in technical services."[6] The certificate program would undoubtedly be strengthened with an infusion of more management and administration courses.

Other types of continuing education opportunities abound for all librarians, from updating or discussion sessions offered by systems specific users groups to more costly commercial workshops on a variety of automation or managerial themes. State and national conventions provide speakers and panels which address pertinent and timely topics relating to personnel, management, automation, standards, networking, evaluation, burnout, or a host of other topics of interest to the technical services manager. Training sessions for planning and implementing new technology are available for everything from an on-line system to a piece of equipment to a specific software package. Publications issued by AMACOM and other management/finance groups and journals which treat specific management issues, like *Personnel Journal*, are useful tools which the technical services manager can add to his/her educational reading. *Library Journal* regularly addresses library management and personnel issues; although the case study approach frequently used by *LJ* can be too elementary, the information is always timely and pertinent.

The most challenging aspect of education for the technical services librarian comes on the job, however, from the continual questioning and review of technical services policies and procedures as they relate to the rest of the library and the ongoing analysis of the various components of technical services and their relationships to the library as a whole. No technical services manager today can escape such an ongoing examination nor can he/she forego the day-to-day self-instruction by which one tries to keep abreast of developments in all areas of librarianship. The technical services manager cannot be isolated in one section of the library since no technical services function operates as an end unto itself. The immediate answer may not be to have all catalogers work at the reference desk, but all technical services staff do need to understand the role of technical services in the service and instructional role of the library, no matter what type it is. The technical services manager serves as catalyst for that understanding, and the role of educator falls to the manager to bring staff to that viewpoint. Education of the manager therefore must extend to education for the managed.

Gorman's[7] admonition of "the necessity for a leader who can not only respond to the needs of today but can also remain open to the implications of change in a continuing manner" applies most definitely to any

technical services manager as librarianship tries to keep current with lightning changes in the world of information. Education about libraries for the technical services manager is usually initially formalized in a library school program, but those courses are just the beginning of a never-ending educational process which tries to accommodate changes as they occur, to anticipate change from an in-depth knowledge of the field, to seek changes necessary for the vitality and effectiveness of the entire library.

**Footnotes**

1. Michael Gorman, "On doing away with Technical Services Departments," *American Libraries* 10:435-37 (July/August 1979).
2. David Peele, "Staffing the Reference Desk," *Library Journal* 105:1708-11 (September 1, 1980).
3. Edward J. Bachus, "'I'll drink to that': the Integration of Technical and Reader Services," *Journal of Academic Librarianship* 8:227,260 (September 1982).
4. Patricia Battin, "Developing university and research library professionals: A director's perspective," *American Libraries* 14:22-25 (January 1983).
5. Margaret A. Rohdy, "The Management of Technical Services - 1980," *Library Resources and Technical Services* 25:319-29 (July/September 1981).
6. Rosary College. Graduate School of Library and Information Science, *Rosary College Bulletin 1984 - 1985*, p.24.
7. Michael Gorman, "A Good Heart and an Organized Mind: Leadership in Technical Services," in *Library Leadership: Visualizing the Future*, ed. Donald E. Riggs (Phoenix, Arizona: The Oryx Press, 1982), p.77.

# *educating the librarian manager*

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> We have no choice but to learn to manage service institutions for performance. If libraries need to be well managed, librarians need to be good managers.
> Miriam H. Tees, "Is it Possible to Educate Librarians as Managers?" *Special Libraries* 75 (July 1984):174.
>
> One reason why highly educated men fail to build successful careers in management is that they do not learn from their formal education what they need to know to perform their jobs effectively. In fact, the tasks that are most important in getting results usually are left to be learned on the job, where few managers master them simply because no one teaches them how.
> J. Sterling Livingston, "Myth of the Well-educated Manager." *Harvard Business Review* 49 (January-February 1971):82.

Everyone, not just librarians, needs and wants to know how to manage. As I write this article, a book by Mark H. McCormack called *What They Don't Teach You at Harvard Business School* is moving to the top of the bestseller list. While some readers of this book may be dreaming of success at the top, more, I would guess, just want to learn how to do their jobs well. The article by Miriam Tees, from which the first introductory quotation was taken, describes some of the difficulties librarians have in becoming good managers, but also emphasizes some important reasons why librarians must learn to manage.[1] As a "librarian's librarian" I am aware that most librarians, who are not students, look for management information because they want to do their jobs better. A substantial portion of current library literature is devoted to management, and an additional portion of general management literature is relevant to librarianship. Thus, the librarian interested in learning about management can turn to the printed word for help. Of course, there are problems. Not every article on management is helpful. There is an unfortunate tendency for writers on management (library or otherwise) to become enamored with the latest theory or technique. Some management literature is shallow, and some is unreadable. Very little of the literature on management is based on research, and some which is based on research is not well done. I have prepared a list of sources of literature for librarians. In general, this list emphasizes current publications, although currency is not essential in management literature. Peter Drucker's *The Effective Executive*, which was first published in 1966, is undiminished in its excellence. The Livingston article, from which the second quotation was taken, is highly recommended although it's more than ten years old. However, a list that included all useful or important literature would be too extensive for the scope of this

1. The Tees article makes several references to articles in the February 1982 issue of *Illinois Libraries* which is on library management education.

article. A place to begin reading management literature is *The Management Process: a Selection of Readings for Librarians*, ed. Ruth Person (Chicago: American Library Association, 1983). This is an excellent collection of articles from journals and chapters from books. The book is divided into sections, each section covers one aspect of management; management in the library setting, decision-making and planning, organizing, communicating, staffing, and directing. Each section also has a bibliography of additional readings. Authors include both librarians and management professionals and the articles have been chosen from business and management journals as well as from library literature. The editor has attempted to provide a variety of viewpoints, and the overall result is very good. In paperback the book costs twenty dollars.

Another collection, this time of original articles, is the most recent volume in *Advances in Library Administration and Organization*, vol. 2 (Greenwich, CT: JAI Press, 1983) forty-five dollars. The librarian authors of these chapters emphasize the theoretical rather than the practical. Success of the authors in presenting their material varies greatly. Two of the more interesting chapters are one by Charles Osborn on collection development and one by J.P. Wilkenson on subject divisionalism. This volume is not as interesting as the *Management Process* and it costs more than twice as much. A different option for those who prefer the more systematic approach of a textbook is G. Edward Evans, *Management Techniques for Librarians* 2d ed. (New York: Academic Press, 1983) twenty-one dollars. While I find Mr. Evans' prescriptive tone a little annoying, the book is quite detailed and full of useful information.

Books are only one way to learn about management. Journals are an excellent way to keep up with the literature of a subject. *Journal of Library Administration* published by Haworth Press, New York, and edited by John Rizzo is one of the few library journals devoted to management issues. Despite some justified complaints about Haworth's erratic publishing schedules, the quality of this journal is good. In fact, two articles in *The Management Process* were reprinted from the *Journal of Library Administration*. The latest issue, volume 5, no. 1 (spring 1984), announces the beginning of a new column "Continuing Education: Shaping Managerial Skill," edited by Paul J. Pugliese. Pugliese will analyze programs and organizations that bring quality management programs training to those who wish to sharpen existing managerial skills, acquire new skills, and increase opportunities for advancement. Another notable feature of the journal is the section called "Worth Repeating from the Management Literature." One or two articles from nonlibrary journals are reprinted in this section. JLA is published quarterly. Subscription price for individuals is thirty-three dollars per year.

Library Administration and Management Association, a division of the American Library Association, publishes a quarterly newsletter, the *LAMA Newsletter*. This newsletter features short articles, bibliographies on management topics, book reviews, announcements about continuing management education, and news of the association. The *LAMA Newsletter* is received as part of the membership to the Library Administration and Management Association. The June 1984 issue of *LAMA Newsletter* featured an article by Margaret Myers, "Human Resources Management in Libraries."

*Library Management Bulletin* is the quarterly publication of the Library Management Division of the Special Library Association. The content of *Library Management Bulletin* is similar to that of the *LAMA Newsletter*. The bulletin for winter 1984 included an article by Larry Besant "Taking Control: Entrepreneurship in Library and Information Science." Each of these publications emphasizes the activities of its own organization. The *Library Management Bulletin*, while also a membership benefit, is also available by subscription for twenty-five dollars per year.

So far this article has presented generic library management. There are, however, sources from which to learn about library management in a particular setting. I will mention some specific examples. *Rural Libraries* 3, no. 2: 63-88 (1983) has an annotated bibliography, "Administration of the Small Public Library," which could be a starting point for the small public librarian wishing to learn more about management. Darlene E. Weingand, *The Organic Public Library* (Littleton, CO: Libraries Unlimited, 1984) $23.50, serves as an introduction to public library administration. It is a breezy synthesis of current thinking on the subject. The book, also useful as a starting point, will encourage further thought and reading.

The recent trend toward evaluation of services has resulted in a number of studies of individual libraries. Among academic libraries these studies have been for the most part self-studies. Frequently the studies have been done under the auspices of the Office of Management Research, Association of Research Libraries, but among public libraries the studies have primarily been done by consultants. These consultants' reports are often noted in *Library Hotline* or *Library Journal* when they are published and are usually sold by the surveyed library. An example of a consultant's report is Lowell Martin's *A Plan for Devel-*

*opment for the San Francisco Public Library*, 1982. The reports put management into a practical setting.

Charles Martell, in his book *The Client-centered Academic Library* (Westport, CT: Greenwood Press, 1983) $29.95, recommends a new organizational structure for academic libraries. Although the focus of the book is academic libraries, it provides thought-provoking, if controversial, reading for all libraries. A collection of essays, *Austerity Management in Academic Libraries*, ed. John F. Harvey and Peter Spyers-Duran (Metuchen, NJ: Scarecrow Press, 1984) $25.00, can also be recommended to a broad spectrum of libraries. The authors discuss the effect of inflation and budget reduction on such varied topics as fund raising, building programs, and budget management.

The Office of Management Studies of the Association of Research Libraries produces a number of valuable publications. Among the newest of the self-study reports is the Michigan State University Libraries OMS Public Services Study. The study is available from OMS for fifteen dollars prepaid. Another series of publications from the Office of Management Studies is the SPEC Kits. SPEC Kits are collections of management policies and procedures which have been collected from the Association of Research Libraries. The Systems and Procedures Exchange Center (SPEC) of OMS, acting as a clearinghouse, gathers examples of in-house documents on current management topics and publishes these unedited documents as SPEC Kits. More than a hundred kits are available. Subjects for the kits include collective bargaining, copyright policies, library materials cost studies, and fees for services to name only a few. These kits, because they offer concrete examples, are very popular. At fifteen dollars they are also a bargain. A subject index to SPEC Kits covering the years 1973-1984 has recently been published.

A new edition of John T. Gillespie and Diana L. Spirt's *Administering the School Library Media Center* (New York: Bowker, 1983) $29.95 is a welcome addition to the literature. An expansion of the first edition published in 1973, it provides both practical and theoretical assistance in the management of the school library/media centers. Chapters describe aspects of services and functions such as the instructional program, budgeting, selection aids, etc. There are bibliographies for further reading at the end of each chapter. The appendices offer directories of government agencies, relevant associations, and the text of seven key documents. An increasing body of literature also examines management of specific functions such as reference and technical services. *Reference Services Administration and Management*, ed. Bill Katz and Ruth Fraley (New York Haworth Press, 1982) $15.00 in paper, also issued as no. 3 of the *Reference Librarian*, draws on the practical experience of reference administrators. While not theoretical, other reference librarians may be able to learn from the experience of the authors. A bibliographic essay on the management of reference services is included in the volume. Because automation is having such a profound effect on the management of technical services operations, it is hard to find management literature which reflects current practice. A newsletter/journal called *Technicalities* which is published by Oryx Press, Phoenix, AZ has had some good articles on aspects of technical services management. The style of *Technicalities* is sometimes rather cute, but for those librarians interested in technical services operations it is probably worth the $24.00 subscription price.

These examples of management literature scarcely even scratch the surface of the literature available. Journals like *Special Libraries, College and Research Libraries*, and the *Journal of Academic Librarianship* have many articles on management. The yearly publication *Advances in Librarianship*, which is overall an excellent publication, frequently treats one or more aspects of library management. *American Libraries* features management as a category in its monthly "Source" column. The "Source" provides references to appropriate literature whether prepared exclusively for librarians or merely of interest to them. *Harvard Business Review* features a column "From the Managers Bookshelf." The librarian reader of this column can keep up with management literature both for collection development purposes and self-education. Finally, reading is only one way to learn about management, but reading can help a librarian identify other ways, conferences and workshops for example. Thus, reading is a good place to start.

**Management Addresses**

American Library Association
50 East Huron
Chicago, IL 60601
312 944-6780

To request publications catalog:
contact Sales Manager, Publishing Services
To Join: contact Public Information Office

Association for Research Libraries
Office of Management Studies
1527 New Hampshire Avenue
Washington, DC 20036
202 232-8656

Library Administration and Management Association
Roger H. Parent, executive director
address the same as the American Library Association

Library Management Division, Special Libraries Association
Business/Advertising Manager

Valero Energy Corporation
P.O. Box 500
San Antonio, TX 78292

Special Libraries Association
235 Park Avenue South
New York, NY 10003
212 477-9250

# *educating a publisher*

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president
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Publishing is often viewed as a glamour industry — fast-paced, exciting, and intellectual. Certainly, the glamour side is there sometimes, but publishing's realities demand attention to thousands of details, much more than eight hours a day of concentration, and the soul of a gambler.

If you ask most people in publishing how they entered the field, they usually say it was through "luck," "contacts," "being in the right place at the right time," or other clichés in a similar vein. More than likely, they are telling you the absolute truth. In reality, there are no formal educational requirements, no codes of ethics, no standards for various positions. Many people consider publishing a vocation. There are few training programs and no formal career ladders. Experience is the greatest teacher in most publishing houses.

Publishing is an endeavor and an industry which blends a curious combination of ethical, financial, and cultural elements. The requirements and restraints of business are coupled with the responsibilities and obligations that publishers bear to society.

## What is the Publishing Industry?

Usually, when we think of the publishing industry, we tend to think of major adult hard- and soft-cover trade publishers. Trade publishing is the most visible part of the industry, but in fact it accounts for less than 25 percent of all industry sales. There are numerous types of publishing within the industry. Each requires a specific set of knowledge and skills. These include children's books; adult trade books — books produced for general consumers, bookstores, and libraries (hard-cover and soft-cover); religious books; professional books; book clubs; mail order books; mass market paperbacks; university presses; elementary and secondary textbooks; college textbooks; subscription and reference books. Many publishers now also produce audiovisual media and computer software. There are also some fifteen thousand to twenty thousand groups publishing in the United States today — alternative presses, small publishers, government agencies, research centers, university presses, trade or labor associations, and professional organizations — which are *not* publishers per se but rather producers of information as a by-product of another major purpose.

## The Publishing Process

Whether or not a company is "commercial," there are many facets of the publishing process which are common. On its most basic level, publishing can be defined as producing and distributing a document. This requires many specialized processes, including administration, production, editorial, marketing, and customer service.

In reality, the process is complicated — and often entrepreneurial. It involves finding or developing the right author or manuscript; evaluating the project and its potential revenues; producing the book — from ini-

tial design through dealing with the printers; planning, marketing, and selling the project — to reach the right audience; and selling the book — from producing invoices to shipping.

The business and administrative aspect of publishing is becoming more important all the time. This is partially because of our "soft" economy, but more basically is a result of conglomerates purchasing publishers. Editorial and marketing personnel are often involved in budgets, profit goal setting, and the analysis of costs and results. Also essential to successful publishing is distribution and fulfillment — receiving and filling orders, insuring delivery, and collecting money. Publishers often delegate many steps in the process to persons or firms outside the house, but what makes a "publisher" is that he or she integrates, controls, and makes sure that all of these processes work.

The best (and worst) part of a publishing job is that it is always changing. On a typical day at Neal-Schuman — if any day can be called typical — I might answer five routine queries from authors or customers, prepare a press release, talk with a wholesaler about discounts, negotiate a contract, consult with an accountant, read a reviewer's report, select mailing lists for a promotion piece, work with an artist on a brochure, prepare a financial or marketing plan, advise an editor about a manuscript, and lunch with a potential author.

**The Librarian-Publisher Relationship**

Librarians often refer to themselves as the "gatekeepers" of knowledge. Yet, in reality, publishers can stake that claim more fairly. Publishers often decide if information will be gathered at all. They also decide format and when, and at what price the information will be available.

Publishing is the process of choosing what will be published, developing the material, and then producing and distributing it. This process is, of course, related closely to selling, lending, or otherwise making available the published product. The skills, talents, and ideas required for publishing are often similar to those required by librarians.

A librarian applying for a publishing job will be at once over- and under-qualified. You have a good deal of formal education — probably more than most people in publishing — yet you probably will not have gone through the "apprenticeship" of clerical or secretarial work, copy editing, or sales. Since there really are no formalized career paths in publishing, this can be a disadvantage. However, it can also work in your favor. You are already an expert, with an expertise many publishers would like to use. Being a librarian makes you consider the wants and interests of your patrons — an important requirement for an editor.

Since publishing is a relatively small industry, available jobs are limited. Qualifications or training necessary for a specific job is very much up to the whim of the person hiring. Some publishers want very specific experience, while others are searching for the "certain someone." Many librarians have been "discovered" that way. Most publishers, however, will agree that the kind of person that they seek has imagination, a wide range of interests and knowledge, the ability to select (in this case articles and manuscripts), a respect for facts, a sense of logic, an ability to get along with people, patience, attention to detail, and energy.

Librarians have been trained to be an important audience for books. Libraries are an important part of the publishing market. They are a major market for poetry, children's books, reference books, university press books, and much new fiction and nonfiction. Libraries are steady customers. They do not generate the volume from which best sellers are made, but they are an important base.

Librarianship is a profession of searching and discovery. Basically we are a profession of generalists, adaptable to a wide variety of work situations, lifestyles, and career options. Our adaptability to other than institutional situations results, in part, from our training as problem solvers — we are not trained necessarily to know the answer, but to at least find out how to find out: to identify the core of information needed; to devise a search strategy to find the information; and, of course, to locate the information if possible. This training is extremely valuable in publishing.

Many librarians have made the transfer into publishing because of publishers who recognize their expertise. Some librarians have become specialists in library promotion, e.g., selling books to libraries; others have entered the scholarly, professional, or reference book fields as acquisitions editors or sponsoring editors.

If you're interested in getting into book publishing, a natural "match" might be companies or organizations that publish professional books for librarians or reference books for the library market. The American Library Association, the Special Libraries Association, the American Society for Information Science, Neal-Schuman, Bowker, Libraries Unlimited, Greenwood Press, JAI Press, Shoestring Press, Meckler Publishing, Pierian Press, and Oryx Press are but a few of the publishers that fall into this category. In addition, many larger trade or specialized publishers such as

McGraw-Hill and Macmillan publish reference books that rely heavily on the library market fields.

The key to any publishing job search, however, is to look beyond the traditional publishers. It is difficult to obtain that first job in publishing; and there is no dearth of willing, eager people who are ready to enter the field. Your advantage as a librarian in seeking a publishing position is your experience in a library — of course, specific experience in compiling or writing books or evaluating materials will be helpful also.

**Library Journalism**

Library journalism is where I began my career in publishing. I was able to use my experience of editing newsletters in libraries, my interest in what should be published for librarians, and the articles that I had written for the library press as job qualifications. This, in addition to solid work experience in libraries and involvement in the field, was the combination of skills sought for the associate editor position at *School Library Journal*, my first job in publishing.

There are few full-time paying positions for library journalists and book reviewers, but there are over a thousand library periodicals, newsletters, and house organs published in the United States which provide plenty of opportunities for freelance or volunteer work — wonderful places to begin to gain experience in writing and editing.

**Finding a Job**

What further advice can I give to others who want to enlarge their career horizons? Analyze your skills — library and nonlibrary. What is it that you like doing? Figure out how you can get the experience that you need. (For example, most people hate to write. If you like to, volunteer; there is a need for writers in every library — be it for manuals, policies, press releases, or whatever.) What kind of environment do you want to work in? Are you willing to take calculated risks? If so, think through what kind of risks. Take advantage of all the general kinds of training available first, then specialize. Career goals can be specific, while still general. Get involved in professional groups.

The key to finding a job in any facet of the publishing industry is research. Peruse *Literary Market Place (LMP)*. Check *Alternatives in Print*, *Information America*, *The International Directory of Little Magazines and Small Presses*, and other references. Talk to publishers' representatives who exhibit at conferences. Read *Publishers Weekly*. Write letters to publishers that interest you. Most are happy to talk with librarians. Network. Contacts are the important key to finding any publishing position.

Education for publishing is really still in its nascent stages. While certainly not a prerequisite for any position, courses will help you understand the industry and often can provide valuable contacts and job leads. Many library school courses provide a helpful background for a career in publishing. I teach a course on modern book publishing at the Columbia University School of Library Service. Many library schools offer similar courses. Also useful are the basic literature courses, collection development, history of books and printing, technical services, and any other course of study which broadens your knowledge of the operational aspects of how libraries buy and handle books. Actual library experience in the areas of reference and acquisitions will be valuable also.

Recently, more and more institutions have begun offering education courses and/or degree programs and introducing summer institutes. The following are some of the major institutions. A more complete listing can be found in *LMP*.

American University
College of Public Affairs
Washington, DC 20016

George Washington University
Division of Continuing Education
801 22 Street, NW, Suite T-409
Washington, DC 20052

Harvard-Radcliffe Summer School
Publishing Procedures Course
6 Ash Street
Cambridge, MA 02138

Hofstra University
Publishing Studies Program
Hempstead, NY 11550

Howard University Press Book Publishing Institute
2900 Van Ness Street, NW
Washington, DC 20008

New York University School of Continuing Education
Center for Publishing & Graphic Design
2 University Place
New York, NY 10003

City University of New York
Graduate Center
Education in Publishing Program
33 West 42 Street
New York, NY 10036

Rice University
Publishing Program
Office of Continuing Studies
Houston, TX 77001

Stanford University (Alumni Association)
Continuing Education
Stanford, CA 94305

U.S. Department of Agriculture, Graduate School
Room 1030, South Building
14 Street and Independence Avenue
Washington, DC 20250

University of California/Davis
UCD Extension
Davis, CA 95616

Other good sources of courses and lectures are the American Association of Publishers (AAP), which offers a continuing education course, and *Folio Magazine*, which holds an Annual Publishing Conference and Exposition each fall and full-day book publishing workshops in the spring (125 Elm Street, New Canaan, CT 06840). It's wise to check *Publishers Weekly*'s calendar listings, *LMP*, and organizations such as: American Booksellers Association, Association of American University Presses, COSMEP (Committee of Small Magazine Editors and Publishers), Society for Scholarly Publishing, and Women's National Book Association, Inc.

Landing a job in publishing takes determination, patience, skill, and creativity. Keeping a position and expanding your career will take ambition, enthusiasm, energy, and the ability to think, act, and work quickly. The salary probably will not be enormous, but it should be roughly comparable to or slightly better than those available in libraries. As a librarian, you probably have many skills publishers need — an understanding and appreciation of books, facts, and ideas; an ability to research, to focus on details; to organize and evaluate; and to assess the potential audience for ideas. If, in addition, you have a burning desire to be a part of the initial creation and dissemination of information, publishing can be a viable and rewarding career.

**Recommended Reading**


AAP Education for Publishing Committee. *The Accidental Profession: Education, Training and the People of Publishing*. New York: Association of American Publishers, 1977.

Bailey, Herbert S. Jr. *The Art and Science of Book Publishing*, 2d ed. Austin, TX: University of Texas Press, 1980. Paper.

Coser, Lewis, et al. *Books: The Culture and Commerce of Publishing*. New York: Basic Books, 1979.

Dessauer, John P. *Book Publishing, What It Is, What It Does*, 2d ed. New York: Bowker, 1981.

Follett, Robert J. R. *The Financial Side of Book Publishing: A Correspondence Course in Business Analysis for the Non-Accountant*. New York: Association of American Publishers, 1982.

Grannis, Chandler B. *Getting Into Book Publishing*. New York: Bowker, 1983.

*Publishing Positions: 30 Job Descriptions in Editing, Production, Marketing, Customer Service and Administration*. New York: Association of American Publishers, 1977.


*Partially adapted from "Publishing and Library Journalism," *New Options for Librarians: Finding a Job in a Related Field*, edited by Betty-Carol Sellen and Dimity S. Berkner. New York: Neal-Schuman Publishers, 1984.


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# viewing the mls from the vendor's perspective

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Preparation for a career in technical services, particularly with an emphasis on library automation, fosters skills which are readily translatable to the private sector. Those interested in making the shift, however, should be prepared to adjust the points of view and emphases traditionally taught. Library educators, for their part, should note the growing number of their students who will seek or be placed in what are now considered nontraditional careers, and should mold the educational process to incorporate the business management and marketing skills that these students will require. In the end, we may well find that these new skills added to those we consider fundamental will produce librarians who are not only better prepared for the private sector but better prepared to serve in traditional library positions.

The technical services librarian who chooses a career in the private sector will find that the work environment there is similar in many ways to the library. This is true because the technical services professional is, after all, first and foremost a manager. The primary goal of technical services is to manage the people and processes involved in such a way as to deliver the best service in the most cost effective manner. Business goals are generally expressed in these terms as well.

Management in technical services has become more important than ever in the recent years of budgetary constraint. In order to maintain public service levels and to continue collection development, many libraries have looked to technical services for economies. Much as the business manager has, during these same years, fine tuned his operation, so has the technical services department of the library. In doing so, the technical services professional has utilized many good business skills: work flow has been analyzed, automation introduced, staffing levels have been evaluated, unnecessary routines and procedures have been eliminated, external consultants have often been utilized, and the outside supplier has been critically examined. These same procedures have been used by GM and Ford managers, as we often read in magazines such as *Business Week* or *Forbes*. The end result of all these efforts has been to effectively manage people and processes to achieve greater productivity while maintaining quality of service. Though this terminology is seldom used in libraries or espoused in library schools, this is in effect the ultimate goal of the technical services librarian.

The number of professional librarians employed by the vendor community has increased rapidly in the past several years. This increase may be directly attributable to the rise in the number of library automated systems; opportunities to move to the vendor side have been primarily available for those with a technical services or automation background. It is clear, however, that the vendor has seen a positive result from this trend and that it will continue. A library professional in business serves as a translator, on the one hand helping the vendor understand the needs of the library so his products can better fit the market, and on the other hand, presenting the vendor's products or services more effectively to the library, thus insuring better sales. The professional has credibility which comes as a direct result of formal training and experience as a practicing librarian. In fact, many librarians look to their colleagues in the vendor community to serve as informal consultants, helping them with reorganization or with the evaluation of the latest automated systems.

Formal training in library science does teach skills which apply to the business environment. The reference interview, for example, reappears as needs assessment when discussing a product or service with a librarian who is your client. Organizational skills are fundamental in libraries and in business as well, and library science training is in fact the mastery of one extensive organizational system. Coursework in automation and systems analysis is directly related. Even audiovisual coursework has relevance, since effective presentations which include the use of visual aids are vital in the competitive business world.

Among the courses traditionally offered, serials, in particular, could receive increased attention. Serials

presently account for up to 80 percent of the library world's expenditures, yet it appears that serials cataloging is the primary focus of our library schools. Acquisition of serials is a complex area which requires a good deal of expertise, as those involved in the process will attest, and which merits formal training. On-line serials control systems also require an understanding of the unique problems presented in managing serials receipt and maintenance.

Some library schools are taking positive steps to address this lack of serials training. In the past year, two of Faxon's regional representatives have been asked to guest lecture to library school students. They have presented not the specific services of our company but an analysis of the information industry and the role of serials and serials agents within it. At the same time, their presence in these classes has afforded students a closer look at an alternative career choice and a chance to ask questions about one.

In addition, several library schools are also making arrangements with Faxon and other vendors to provide access to various on-line systems on behalf of their students. Vendors, by and large, are pleased to cooperate with these efforts which represent a natural sharing of needs and resources.

As this crossover between the private sector and the library increases, one result is a tightening of the relationship between the two. This trend has been recognized on a formal basis by the establishment of several vendor/user groups and committees as a part of the ALA structure.

Of note, LITA's Vendor User Discussion Group featured two presentations on joint development efforts at ALA's 1984 summer meeting in Dallas. Representatives from Faxon and the Boston Library Consortium reported on mutual development efforts which resulted in Faxon's Union List system; speakers from NOTIS and the University of Florida focused on the development of the circulation module of NOTIS. Both groups discussed the importance of developing trusting relationships between the library and the vendor. It seems clear that the presence of the library professional on the vendor's staff makes it easier to establish this mutual trust and cooperation.

"Vendor Services in the Information Age," which appeared in *Technical Services Quarterly*, vol. 1, no. 1-2 (Fall/Winter 1983), explores in greater depth the implications of this tightening relationship. In that article, I have theorized that over the next ten years, we will see the "vendor . . . replace the specialists the library can no longer afford to support on a full-time basis."[1]

LITA's Dallas program showed evidence of the theory that

> as the relationship between vendor and library continues to tighten, the library will accept a greater role in the vendor's decision-making process. It will no longer simply be a situation where the library purchases a product that the vendor has developed. Rather, the library as user will be interactively involved in the design, the implementation, and even the success of the vendor product, as the buyer/seller gives way to the team approach.[2]

Preparation for a career in technical services must take into account this shift in the relationship between library and vendor, as well as the crossover between the two. Missing from library education at present are several important areas of study, which are vital in the private sector. These areas include quantitative methods for evaluation and effective decision making, marketing concepts, selling techniques, managements theories and practices, and financial basics.

Even the traditional orientation classes offered at the start of library training need some changes; these classes frequently focus on careers in academic, school, medical, or special libraries but do not advise students of the possibilities now available in library related businesses. Since it is clear that an increasing number of library science graduates will find their way into business, we should cease to think of these careers as nontraditional and should begin to offer formal courses in the topics listed above.

The result of combining traditional library training with business skills and techniques is a library manager who is ready for either the public or the private sector. Introducing a market-driven approach to library management will not only benefit those headed for the private sector but will also help those who seek to secure the library's role in the evolving information age.

In addition to these specific skills and courses, a general shift in emphasis must take place during instruction to properly prepare for the private sector. During our training for a career in library science, we are taught to understand and provide traditional library services; we are generally not taught to look critically at those services or to question their usefulness. The good business, however, is market-driven; that is, it seeks to determine the products or services which are needed and then provide them. At the same time business looks continually to the future and seeks to mold its current services to ensure that positioning for future roles is firm, while maintaining present levels of service. Preparation for technical services ideally must foster these same attitudes and provide the

opportunity for students to look critically at today's library services in light of tomorrow's information needs.

## Footnotes

1. Lenzini, Rebecca T., "Vendor Services in the Information Age," *Technical Services Quarterly*, Vol. 1, No. 1-2 (Fall/Winter 1983), p. 254.
2. Ibid., p. 255.

# *directory, illinois state library*
# *area code 217*

| | | |
|---|---|---|
| *Lamont, Bridget L.* | *Director* | **782-2994** |
| Schmidt, Vincent P. | *Deputy Director* | **782-7848** |
| Adams, Stanley | *Specialist, Library Construction and Statistics* | **782-1891** |
| Allen, Rodney | *Assistant Director for Financial Administration* | **785-0019** |
| Bostian, Irma | *Editor,* **Illinois Libraries** | **782-5870** |
| Dickinson, Janet | *Assistant Director, Cataloging Services and Federal Documents Coordinator* | **782-5012** |
| Ensley, Robert | *Consultant, Institutionalized Services* | **785-0187** |
| Field, Mary Kate | *Head, Circulation* | **785-0363** |
| Fulk, Darlene | *Head, Library Accounting* | **782-3504** |
| Griffiths, Mimi | *Administrator, Administrative Code Unit* | **782-9786** |
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